



# **Health Summary**

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## **User Manual**

**Version 2.7**

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Office of Information  
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# Preface

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The Health Summary package integrates currently available patient data from Veterans Health Administration Information Systems Architecture (**VISTA**) packages into patient health summaries that can be printed or viewed online.

The *Health Summary User Manual* provides information for three types of users:

- Health Summary users who only need to view health summaries on a screen or in printed form. Chapter 2, “Using Health Summary,” describes these basic features.
- Health Summary users who can display health summaries and also create customized health summary types for use by others. Chapter 3, “Advanced Features,” describes how to create health summary types.
- Health Summary Coordinators who can use all the functions available for other user types, as well as the special Health Summary package features for batch printing nightly summaries and creating customized health summary types. Chapter 4, “Managing Health Summary,” describes batch printing and other management functions.

This manual has been revised to describe changes that have been made, through patches, to Health Summary V. 2.7 since its release in 1994.

## Revision History

| <b>Revision Date</b>        | <b>Page or Chapter</b> | <b>Description</b>  |
|-----------------------------|------------------------|---|
| July 2001-<br>February 2002 | throughout             | Revisions for changes made by patches to version 2.7 since its release in 1994, and specifically for patches 29, 45, 47, and 49 |
| January 2002                | Pg 13, 38, 74          | New menu of options enabling managers to control HS types on the reports tab in CPRS  |
| February 2002               | Pg 6                   | Description of changes provided with patch 49   |
| March 2002                  | Page                   |   |

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# **Chapter 1: Introduction**

**New Features**

**Health Summary Menus**

**How to Use This Manual**





# Chapter 1: Introduction

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A Health Summary is a clinically oriented, structured report that extracts many kinds of data from VISTA and displays it in a standard format. The individual patient is the focus of health summaries. Health summaries can also be printed or displayed for groups of patients. The data displayed covers a wide range of health-related information such as demographic data, allergies, current active medical problems, and laboratory results.

## **Packages providing data:**

|                         |                              |
|-------------------------|------------------------------|
| Automated Med Info      | OE/RR                        |
| Exchange (AMIE)         | Outpatient Pharmacy          |
| Allergy Tracking System | Patient Care Encounter (PCE) |
| Clinical Reminders      | Problem List                 |
| Consults                | Progress Notes               |
| Dietetics               | Radiology                    |
| Discharge Summary       | Registration                 |
| Inpatient Medications   | Scheduling                   |
| Lab                     | Social Work                  |
| Medicine                | Surgery                      |
| Mental Health           | VISTA Imaging                |
| Nursing (Vital Signs)   |                              |

Health Summary users can also print an Outpatient Pharmacy Action Profile with bar codes in tandem with a health summary. For complete details on printing a patient's profile, read the section that describes the "Hospital Location Health Summary" option.

Health Summaries (except components with selection items or locally developed components) can be transmitted by PDX — Patient Data Exchange—which transfers patient data between VA facilities using the MailMan electronic mail utility. See PDX V. 1.5 documentation for more information.

## New Features in Health Summary

Some of the more recent patches are described below. For complete descriptions of all of the changes in Health Summary since the release of version 2.7 in 1994, please refer to the patches (described briefly on page 6 and in more detail in the Patch module on Forum).

## New Components

|      |                      |
|------|----------------------|
| CM   | Reminder Maintenance |
| CMB  | Reminder Brief       |
| CR   | Reminders Due        |
| CRS  | Reminders Summary    |
| GAF  | Global Assess Funct  |
| MAGI | MAG Imaging          |
| NSR  | NON OR Procedures    |
| SCD  | Spinal Cord Dysfunct |
| SII  | Sel Image Impression |
| SNSR | Selected NON OR Proc |
| SPN  | Selected Prog Notes  |
| SR   | Surgery Rpt (OR/NON) |
| SVSO | Vital Select Outpat. |
| VSD  | Detailed Vitals      |
| VSO  | Vital Signs Outpat.  |

## Renamed Components

| New Name                        | Old Name                          |
|---------------------------------|-----------------------------------|
| II Imaging Impression           | RI Radiology Impression           |
| SII Imaging Impression Selected | SRI Radiology Impression Selected |
| IP Imaging Profile              | RP Radiology Profile              |
| IS Imaging Status               | RS Radiology Status               |

## Patches that components were released with:

|      |                      |              |
|------|----------------------|--------------|
| CRS  | Reminders Summary    | GMTS*2.7*23  |
| CMB  | Reminder Brief       | GMTS*2.7*34  |
| CR   | Reminders Due        | GMTS*2.7*34  |
| GAF  | Global Assess Funct  | GMTS*2.7*35  |
| MAGI | MAG Imaging          | GMTS*2.7*26  |
| NSR  | NON OR Procedures    | GMTS*2..7*11 |
| SCD  | Spinal Cord Dysfunct | GMTS*2.7*13  |
| SII  | Sel Image Impression | GMTS*2.7*26  |
| SPN  | Selected Prog Notes  | GMTS*2.7*12  |
| SRO  | Surgery Only         | GMTS*2..7*11 |
| SVSO | Vital Select Outpat. | GMTS*2.7*8   |
| VSD  | Detailed Vitals      | GMTS*2.7*35  |
| VSO  | Vital Signs Outpat   | GMTS*2.7*8.  |
| SNSR | Selected NON OR Proc | GMTS*2..7*11 |
| SR   | Surgery Rpt (OR/NON) | GMTS*2..7*11 |
| CM   | Reminder Maintenance | GMTS*2.7*34  |

## **Patch GMTS\*2.7\*29 and GMTS\*2.7\*48**

Health Summary patches 29 and 48 export components for using Remote Data Views. With all the proper patches installed, you may view remote patient data through CPRS. Before you can do this, you must have Master Patient Index/Patient Demographics (MPI/PD) and several other patches installed. Once these are in place and the proper parameters have been set, you can access remote data from other VA facilities.

Currently, remote data views are limited to predefined, nationally exported Health Summary Types. Remote data may not be viewed by either the Ad Hoc Health Summary type or locally/user developed Health Summary types.

You can view remote clinical data using any Health Summary Type that has an identically named Health Summary Type installed at both the local and remote sites. However, for non-nationally exported health summary reports, the content of the report is subject to the report structure and configuration defined at the remote site.

Patch 29 (GMTS\*2.7\*29) adds the following Remote Data Views types:

- REMOTE DEMO/VISITS/PCE (3M)
- REMOTE MEDS/LABS/ORDERS (3M)
- REMOTE TEXT REPORTS (3M)
- REMOTE CLINICAL DATA (3M)
- REMOTE CLINICAL DATA (1Y)
- REMOTE DEMO/VISITS/PCE (1Y)
- REMOTE MEDS/LABS/ORDERS (1Y)
- REMOTE TEXT REPORTS (1Y)
- REMOTE CLINICAL DATA (4Y)
- REMOTE LABS LONG VIEW (12Y)
- REMOTE LABS ALL (1Y)
- REMOTE LABS ALL (3M)
- REMOTE DIS SUM/SURG/PROD (12Y)
- REMOTE OUTPATIENT MEDS (6M)
- REMOTE ONCOLOGY VIEW

See Chapter 3, section 2 for more information on using Remote Data Views.

**GMTS\*2.7\*45**

The purpose of this patch is to allow the Health Summary components 'Progress Notes' and 'Selected Progress Notes' to display the new interdisciplinary progress notes and all of the entries associated with the interdisciplinary note. The interdisciplinary note and all of the associated entries will be marked in the progress note components as follows:

| <b>Note Type</b>    | <b>Marked as</b>                        |
|---------------------|---|
| Primary Note:       | Interdisciplinary Note                  |
| Addendum to Primary | Interdisciplinary Note (addendum)       |
| Child Note          | Interdisciplinary Note Entry            |
| Addendum to Child   | Interdisciplinary Note Entry (addendum) |

**Patch GMTS\*2.7\*47**

A menu of options has been added, CPRS Reports Tab “Health Summary Types List,” that allows users to control the Health Summary Types and the order that the Health Summary Types are listed in the Health Summary Types box on the Reports Tab of CPRS. This menu option has four menu items to edit and display the users’ preferences.

**Patch GMTS\*2.7\*49**

A menu of options has been added, “CPRS Health Summary Display/Edit Site Defaults,” that allows IRM/Managers to control which Health Summary Types are on the reports tab and the order that the Health Summary Types appear in for the site. These site defaults will be used for users who do not have personal preferences set. This menu has four menu items to edit and display defaults for the site.

This patch also contains several fixes to problems reported by NOIS or E3Rs. The following is a list of the problems fixed by this patch:

1. The Outpatient Encounters (OE) component has been modified to display the correct CPT Modifier. (Routine GMTSPXOP) **NOIS MIW-1001-42854**
2. PCMM information and Treating Facilities has been added to Demographics and Brief Demographics components (Routine GMTSDEM and GMTSDEMB)  
**NOIS PHI-1098-21901, LAH-0601-62620, E3R 840611290**

3. Modified Date Range processing for the Imaging Profile component to prevent missing imaging reports for the date of the beginning date of the date range. (Routine GMTSRAE) **NOIS BAY-1001-31348**
4. Modified the method of building the list of Health Summary Types for the Reports Tab so that division and user parameters are not over-written by the system parameters. (Routines GMTSXA\* namespace)  
**NOIS TAM-0901-30865, HWH-1101-40395**
5. Modified the GMTS TYPE INQ P E34 16528rint Template to allow for 132 column output, preventing the truncation of selection items in the display.  
**NOIS PUG-0801-52286**
6. Several routines were found to be inappropriately setting the package-wide variable GMTSNDM (Occurrence Limits), causing components that followed to error on occurrence limits. This was discovered while researching CPH-1001-43354 (Adhoc GAF Score Not Displaying Data). (Routines GMTSAMIE, GMTSDA, GMTSFH, GMTSGAF, GMTSMHPE, GMTSPN, GMTSVS, GMTSVSD, and GMTSVSS) **NOIS CPH-1001-43354 WPB-0102-30729**
7. Modified 'Hospital Location Health Summary' so that the check for patients at a hospital location is conducted at the time the queued task is run instead of when the option is invoked. (Routines GMTSPD, GMTSPD2 and GMTSPL)  
**NOIS WPB-0700-32306**
8. Modified 'Outpatient Encounter' component so that the hospital location in the Outpatient Encounter in the Clinical Reports on the Reports Tab matches the Hospital Location in the Health Summary Ad Hoc. (Routine GMTSPXOP)  
**NOIS LON-1101-60705**
9. Modified Medicine Health Summary components so that the message text is removed from the S.MCHL7SERVER server basket. (Routine GMTSMCMA)  
**NOIS MON-1101-50729**
10. Modified Discharge Summary print routines so package-wide variables (beginning date and ending date) do not get reset preventing other components from printing. (Routines GMTSPN1 and GMTSPN2) **NOIS WPB-1201-30207**
11. Post-Init correctly renames Radiology components in the VAQ - DATA SEGMENT file (#394.71). **NOIS LEX-0102-40427**

12. Modified GAF component to allow multiple providers to enter varying GAF scores on the same visit date/time. (Routine GMTSGAF) **NOIS ECH-1101-50146**
13. Pre-Init removes test versions of GUI Site Default options.
14. As part of an on-going project to document all of the entry points and DBIAs in Health Summary, the following routines are being re-issued with minor documentation changes:

|          |          |          |          |          |
|----------|----------|----------|----------|----------|
| GMTS     | GMTS1    | GMTSADH2 | GMTSADH3 | GMTSADH5 |
| GMTSALG  | GMTSALGB | GMTSCI   | GMTSCM   | GMTSDCB  |
| GMTSDD   | GMTSDGA  | GMTSDGA1 | GMTSDGA2 | GMTSDGC2 |
| GMTSDGD  | GMTSDGH  | GMTSDGP  | GMTSDVR  | GMTSLOAD |
| GMTSLREM | GMTSLRMX |          |          |          |

**Released Patches for Health Summary 2.7**

| <b>Patch #</b> | <b>Description</b>   | <b>Release Date</b> |
|----------------|----------------------|---------------------|
| GMTS*2.7*1     | Syntax Error in GMTS | 12/28/95            |
| GMTS*2.7*2     | Visit Dates, Task &  | 02/29/96            |
| GMTS*2.7*3     | LAB Anatomic Path Ac | 09/06/96            |
| GMTS*2.7*4     | Medicine Data w/ Quo | 04/12/96            |
| GMTS*2.7*5     | CVP, EADT, Nightly T | 05/13/96            |
| GMTS*2.7*6     | Patient Selection    | 06/06/96            |
| GMTS*2.7*7     | HS Utilities, MXSTR  | 11/24/96            |
| GMTS*2.7*8     | HS - PCE Components  | 08/22/96            |
| GMTS*2.7*9     | Lab Orders/Surgical  | 11/08/96            |
| GMTS*2.7*10    | PCE Components       | 03/04/97            |
| GMTS*2.7*11    | SURGERY COMPONENT FI | 10/23/98            |
| GMTS*2.7*12    | TIU-COMPATIBLE COMPO | 09/29/97            |
| GMTS*2.7*13    | Spinal Cord Dysfunct | 01/06/97            |
| GMTS*2.7*14    | Updated Rad/Nuc Med  | 05/15/97            |
| GMTS*2.7*15    | Pharmacy & Current O | 06/05/98            |
| GMTS*2.7*16    | Health Summary Fixes | 10/07/97            |
| GMTS*2.7*17    | Blood Bank Component | 10/07/97            |
| GMTS*2.7*18    | Code change to accom | 03/27/98            |
| GMTS*2.7*19    | Duplicates on CVP co | 10/10/97            |
| GMTS*2.7*20    | UPDATED COMPONENTS f | 06/05/98            |
| GMTS*2.7*21    | Report headings and  | 03/30/98            |
| GMTS*2.7*22    | Reminders-historical | 11/10/97            |
| GMTS*2.7*23    | NEW REMINDER COMPONE | 02/05/98            |
| GMTS*2.7*24    | Patient selection &  | 03/30/98            |
| GMTS*2.7*25    | Component fixes      | 09/10/98            |
| GMTS*2.7*26    | Imaging Component    | 09/09/99            |
| GMTS*2.7*27    | Y2K COMPLIANCE CHANG | 04/17/98            |
| GMTS*2.7*28    | Y2K, NKA, LAB, VITAL | 03/05/99            |
| GMTS*2.7*29    | Remote Data View/Pri | 05/17/01            |
| GMTS*2.7*30    | HS Type Lookup/Concu | 08/06/99            |
| GMTS*2.7*31    | Inactive Clinics     | 10/12/99            |
| GMTS*2.7*32    | Fix HS Type Lookup   | 09/28/99            |
| GMTS*2.7*33    | Progress Notes by Vi | 10/13/99            |
| GMTS*2.7*34    | Clinical Reminder Di | 06/21/00            |
| GMTS*2.7*35    | Vitals/GAF/Oncology/ | 05/19/00            |
| GMTS*2.7*36    | Oncology/Lab/Ad Hoc  | 12/06/99            |
| GMTS*2.7*37    | CPT Modifiers and RX | 07/28/00            |
| GMTS*2.7*40    | Undefined Variable D | 09/01/00            |
| GMTS*2.7*42    | Oncology Component C | 12/21/00            |
| GMTS*2.7*43    | HFS/Window Print Fix | 05/07/01            |
| GMTS*2.7*44    | Error in GAF Score   | 12/27/00            |
| GMTS*2.7*45    | Interdisciplinary Pr | 04/20/01            |
| GMTS*2.7*46    | Consults Brief Compo | 06/28/01            |
| GMTS*2.7*47    | CPRS Report Tab/NDBI | 10/04/01            |
| GMTS*2.7*48    | Remote Oncology View | 09/05/01            |
| GMTS*2.7*49    | Demographics/HS Type | 03/05/02            |
| GMTS*2.7*50    | Spinal Cord Dysfunct | 02/01/02            |

**Resolved E3Rs since Release of Health Summary 2.7**

| <b>E3R</b> | <b>Date</b> | <b>Description</b>                          | <b>Resolution</b>   |
|------------|-------------|---|---|
| 2612       | JUN 23,1993 | SPECIAL INSTRUCTIONS                        | Rolled into E3R 9218 12/10/1996 Print Special Instruction in Unit Dose UD   |
| 3111       | OCT 14,1993 | PN COMPONENT                                | Release Text Integration Utility v 1.0 Jun 20, 1997   |
| 5636       | JAN 3,1995  | RX/CV SELECTED COMPONENTS                   | GMTS*2.7*5  |
| 6128       | MAR 30,1995 | Oncology Component                          | Release of Oncology Component in GMTS*2.7*36 Dec 4, 1999  |
| 6476       | JUN 12,1995 | SHOW ONLY CERTAIN PROGRESS NOTES (BY TITLE) | Release Text Integration Utility v 1.0 Jun 20, 1997   |
| 6568       | JUN 30,1995 | ACTION PROFILE BY PATIENT                   | This was included with Health Summary 2.7   |
| 6734       | JUL 21,1995 | NEED API TO SELECT COMPONENTS               | Will document MAIN^GMTSADOR as a supported API for version 2.7. This entry point will work for version 2.5 also.  |
| 6830       | AUG 9,1995  | UNIQUE FIRST LETTER IN OPTION NAMES         | Will fix in current version.  |
| 7072       | SEP 27,1995 | ADD COMPONENT OF "PROGRESS NOTES BY TITLE"  | Release of Text Integration Utility v 1.0 Jun 20, 1997  |
| 7290       | NOV 8,1995  | IMMUNIZATION DATE                           | Functionality currently exists in Health Summary 2.7.   |
| 7475       | DEC 12,1995 | UNSIGNED D/C SUMMARY INCLUDED IN HS TOOL    | The Health Summary EP discussed this request on Feb. 29, 1996. It was determined to leave the Discharge Summary components as they currently are. What is being shown, meets with the Discharge Summary EPs requirements.   |
| 7562       | DEC 29,1995 | ABREVIATE THE TEXT OF THE DESCRIPTION       | The site's ability to specify the format of the ICD9 text and Provider Narrative in version 2.7 accommodates this requests.   |
| 7563       | DEC 29,1995 | GROUPING OF CLINICS                         | The Health Summary EP discussed this on February 29, 1996. It was determined that at this time this request can't be met with the existing tools. The EP recommended deferring this request till the primary Care Module comes out. This request can then be review again to see if we can provide this functionality |



| <b>E3R</b> | <b>Date</b> | <b>Description</b>                                 | <b>Resolution</b>   |
|------------|-------------|--|---|
| 7564       | DEC 29,1995 | NEW COMPONENT                                      | The Health Summary EP reviewed this request on Feb. 29, 1996. This information is available through the PIMS package. The EP decided that a new component shouldn't be developed based on this request since it is available through the PIMS package and components provide data for a specific patient not for a group of patients  |
| 7592       | JAN 9,1996  | LOG OFF PROGRAM                                    | There was a PGMOV at the site. I worked with the IRM Service to resolve the problem. Mr. Klein has been made aware of the situation. A NOIS, #50353, was entered and closed with documentation relating to this issue.  |
| 7614       | JAN 15,1996 | CREATING A COMPACT DISPLAY FOR SIGN OUT SHEETS     | The Health Summary Expert Panel Discussed this on Feb. 29, 1996. The Health Summary package was developed to provided data by patient. It wasn't set up to be a report generator. The format for a Health Summary Type and components was specified by the EP and through test sites. Health Summary was never meant to provide an avenue to input data into a chart copy. Its purpose is to display the data that exist for a patient based upon which components are included in a health summary type.<br>This issue has been discussed before. It get to the point of what should Health Summary be? Should it also be a report generator? This issue was taken to the CARG for resolution and as far as we know, the CARG has never provided the EP with a resolution. |
| 7716       | FEB 1,1996  | SHOW DATE OF DEATH NEXT TO DECEASED.               | The Date of Death as requested has been included on Patch GMTS*2.7*2 that was released to the field (2/29/96).  |
| 7736       | FEB 6,1996  | TOO MANY CARRIAGE RETURNS                          | The Health Summary EP discussed this on Feb. 29, 1996. They determined to deny this request.  |
| 7791       | FEB 15,1996 | SELECTED PROGRESS NOTES                            | This has been requested previously. Version 3.0 of Progress Notes is currently being developed using the Text Integration Tools package. It was determine that this request should be done for version 3.0 of progress notes.   |
| 7849       | FEB 27,1996 | CREATE COMPONENT FOR PROBLEM LIST TO SHOW COMMENTS | Already included in the current version of Health Summary.  |

| <b>E3R</b> | <b>Date</b>  | <b>Description</b>                               | <b>Resolution</b>   |
|------------|--------------|--|---|
| 8397       |              | SELECT ANOTHER PATIENT MALFUNCTION               | Patient Selection updated in OR 3.0/CPRS.   |
| 8573       | JUL 16,1996  | NEW COMPONENT FOR SELECTED PROGRESS NOTES TITLES | Released Text Integration Utility v 1.0 Jun 20, 1997  |
| 8590       | JUL 19,1996  | DISPLAY VITALS IN CENTIGRADE AND KGS             | The request has been included in patch, GMTS*2.7*8, routines released 8/22/96 with PCE v1.0. Information patch from health summary released.                    |
| 9149       | NOV 22,1996  | DISPLAY COMMENT FIELDS IN PCE                    | The Comments have been added to the Health Summary components as requested. Patch, GMTS*2.7*10 along with PX*1*13, were released to provide this functionality. |
| 9347       | JAN 16,1997  | INPT DO NOT SHOW ON OUTPATIENT ENCOUNTER LIST    | Patches GMTS*2.7*10 and PX*1*13 were released that will provide for inpatients being included on the health summary component for Outpatient Encounters.        |
| 9380       |              | FILTER PROGRESS NOTES BY TITLE                   | Released Test Integration Utilities v 1.0 Jun 20, 1997  |
| 12417      | MAY 3,2001   | ADD HS COMPONENT FOR PCMM PROVIDER/TEAM          | Rolled into E3R 11290, 7/15/1998, New Component - Primary Care PCMM   |
| 13770      | JAN 31,2000  | ADD PAIN TO VITAL SIGNS COMPONENT                | This E3R is being resolved by a Health Summary patch that is currently under development.   |
| 8406       | JUN 10,1996  | TEAM CARE COMPONENT                              | Resolved by GMTS*2.7*49   |
| 11290      | JUL 15, 1998 | PRIMARY CARE DATA                                | Resolved by GMTS*2.7*49   |
| 16528      | OCT 22,2001  | NEED HEALTH SUMMARY SETTING                      | Resolved by GMTS*2.7*49   |

## Health Summary Menus

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### Health Summary Overall Menu [GMTS MANAGER]

The Health Summary Overall Menu contains all four Health Summary menus. IRM staff members or Clinical Coordinator who need access to all menus are assigned the Health Summary Overall Menu [GMTS MANAGER] rather than each menu separately. This User Manual describes the options on the first three menus; options on the Health Summary Maintenance Menu [GMTS IRM/ADPAC MAINT] are described in the Health Summary Technical Manual.

#### 1. Health Summary Menu [GMTS USER]

---

This menu is for users who only need to print or display health summaries.

- 1 Patient Health Summary [GMTS HS BY PATIENT]
- 2 Ad Hoc Health Summary [GMTS HS ADHOC]
- 3 Range of Dates Patient Health Summary [GMTS HS BY PATIENT & DATE RANG]
- 4 Visit Patient Health Summary [GMTS HS BY PATIENT & VISIT]
- 5 Hospital Location Health Summary [GMTS HS BY LOC]
- 6 Information Menu ... [GMTS INFO ONLY MENU]
  - 1 Inquire about a Health Summary Type [GMTS TYPE INQ]
  - 2 List Health Summary Types [GMTS TYPE LIST]
  - 3 Inquire about a Health Summary Component [GMTS COMP INQ]
  - 4 List Health Summary Components [GMTS COMP LIST]
  - 5 List Health Summary Component Descriptions [GMTS COMP DESC LIST]
7. CPRS Reports Tab 'Health Summary Types List' Menu ... [GMTS GUI HS LIST]
  - 1 Display 'Health Summary Types List' Defaults [GMTS GUI HS LIST DEFAULTS]
  - 2 Precedence of 'Health Summary Types List [GMTS GUI HS LIST PRECEDENCE]
  - 3 Method of compiling 'Health Summary Types List [GMTS GUI HS LIST METHODS]
  - 4 Edit 'Health Summary Types List' Parameters [GMTS GUI HS LIST PARAMETERS]

## 2. Health Summary Enhanced Menu [GMTS ENHANCED USER]

---

This menu is for users who need to create, modify, or delete their *own* health summary types, in addition to printing health summaries.

- 1 Patient Health Summary [GMTS HS BY PATIENT]
- 2 Ad Hoc Health Summary [GMTS HS ADHOC]
- 3 Range of Dates Patient Health Summary [GMTS HS BY PATIENT & DATE RANG]
- 4 Visit Patient Health Summary [GMTS HS BY PATIENT & VISIT]
- 5 Hospital Location Health Summary [GMTS HS BY LOC]
- 6 Information Menu ... [GMTS INFO ONLY MENU]
  - 1 Inquire about a Health Summary Type [GMTS TYPE INQ]
  - 2 List Health Summary Types [GMTS TYPE LIST]
  - 3 Inquire about a Health Summary Component [GMTS COMP INQ]
  - 4 List Health Summary Components [GMTS COMP LIST]
  - 5 List Health Summary Component Descriptions [GMTS COMP DESC LIST]
- 7 Create/Modify Health Summary Type [GMTS TYPE ENTER/EDIT]
- 8 Delete Health Summary Type [GMTS TYPE DELETE]
- 9 CPRS Reports Tab 'Health Summary Types List' Menu ... [GMTS GUI HS LIST]
  - 1 Display 'Health Summary Types List' Defaults [GMTS GUI HS LIST DEFAULTS]
  - 2 Precedence of 'Health Summary Types List' [GMTS GUI HS LIST PRECEDENCE]
  - 3 Method of compiling 'Health Summary Types List' [GMTS GUI HS LIST METHODS]
  - 4 Edit 'Health Summary Types List' Parameters [GMTS GUI HS LIST PARAMETERS]

## 3. Health Summary Coordinator's Menu [GMTS COORDINATOR]

---

This menu is for users who need to print or display health summaries, and who will also need to create, modify, or delete health summary types, and set up nightly batch printing at specified locations

- 1 Print Health Summary Menu ... [GMTS HS MENU]
  - 1 Patient Health Summary [GMTS HS BY PATIENT]
  - 2 Ad Hoc Health Summary [GMTS HS ADHOC]
  - 3 Range of Dates Patient Health Summary [GMTS HS BY PATIENT & DATE RANG]
  - 4 Visit Patient Health Summary [GMTS HS BY PATIENT & VISIT]
  - 5 Hospital Location Health Summary [GMTS HS BY LOC]
  - 6 Batch Print of All Clinics by Visit Date [GMTS HS FOR ALL CLINICS]
- 2 Build Health Summary Type Menu ... [GMTS BUILD MENU]
  - 1 Create/Modify Health Summary Type [GMTS TYPE ENTER/EDIT]
  - 2 Delete Health Summary Type [GMTS TYPE DELETE]
  - 3 Information Menu ... [GMTS INFO ONLY MENU]
    - 1 Inquire about a Health Summary Type [GMTS TYPE INQ]
    - 2 List Health Summary Types [GMTS TYPE LIST]
    - 3 Inquire about a Health Summary Component [GMTS COMP INQ]
    - 4 List Health Summary Components [GMTS COMP LIST]
    - 5 List Health Summary Component Descriptions [GMTS COMP DESC LIST]

## Health Summary Coordinator's Menu [GMTS COORDINATOR], cont'd

- 4 Print Health Summary Menu ... [GMTS HS MENU]
  - 1 Patient Health Summary [GMTS HS BY PATIENT]
  - 2 Ad Hoc Health Summary [GMTS HS ADHOC]
  - 3 Range of Dates Patient Health Summary [GMTS HS BY PATIENT & DATE RANG]
  - 4 Visit Patient Health Summary [GMTS HS BY PATIENT & VISIT]
  - 5 Hospital Location Health Summary [GMTS HS BY LOC]
  - 6 Batch Print of All Clinics by Visit Date [GMTS HS FOR ALL CLINICS]
- 3 Set-up Batch Print Locations [GMTS HS BY LOC PARAMETERS]
- 4 List Batch Health Summary Locations [GMTS TASK LOCATIONS LIST]
- 5 CPRS Reports Tab 'Health Summary Types List' Menu ... [GMTS GUI HS LIST]
  - 1 Display 'Health Summary Types List' Defaults [GMTS GUI HS LIST DEFAULTS]
  - 2 Precedence of 'Health Summary Types List' [GMTS GUI HS LIST PRECEDENCE]
  - 3 Method of compiling 'Health Summary Types List' [GMTS GUI HS LIST METHODS]
  - 4 Edit 'Health Summary Types List' Parameters [GMTS GUI HS LIST PARAMETERS]

## 4. Health Summary Maintenance Menu [GMTS IRM/ADPAC MAINT MENU]

---

This menu is for IRM staff or Clinical Coordinators who help implement and maintain Health Summary. Options on this menu are described in the Health Summary Technical Manual.

- 1 Disable/Enable Health Summary Component [GMTS IRM/ADPAC ENABLE/DISABLE]
- 2 Create/Modify Health Summary Components [GMTS IRM/ADPAC COMP EDIT]
- 3 Edit Ad Hoc Health Summary Type [GMTS IRM/ADPAC ADHOC EDIT]
- 4 Rebuild Ad Hoc Health Summary Type [GMTS IRM/ADPAC ADHOC LOAD]
- 5 Resequence a Health Summary Type [GMTS IRM/ADPAC TYPE RESEQUENCE]
- 6 Create/Modify Health Summary Type [GMTS TYPE ENTER/EDIT]
- 7 Edit Health Summary Site Parameters [GMTS IRM/ADPAC PARAMETER EDIT]
- 8. CPRS Reports Tab 'Health Summary Types List' Menu ... [GMTS GUI HS LIST]
  - 1 Display 'Health Summary Types List' Defaults [GMTS GUI HS LIST DEFAULTS]
  - 2 Precedence of 'Health Summary Types List' [GMTS GUI HS LIST PRECEDENCE]
  - 3 Method of compiling 'Health Summary Types List' [GMTS GUI HS LIST METHODS]
  - 4 Edit 'Health Summary Types List' Parameters [GMTS GUI HS LIST PARAMETERS]
- 9 CPRS Health Summary Display/Edit Site Defaults
  - 1 Display Site Health Summary List Defaults
  - 2 Edit 'Health Summary Type List' Parameters
  - 3 Edit Default HS Type List Compile Method
  - 4 Add/Edit Allowable Entities for HS List
  - 5 Resequence Allowable Entities for HS List

## How to Use This Manual

If you are new to **VISTA** and the VA computer system, see Appendix D for guidelines about using the computer.

### *Option examples*

Menus and examples of computer dialogue that you'll see on your terminal are shown here in boxes:

```
Select Health Summary Type: OUTPATIENT_
Select Patient: WEIGHTS,TOM 10-03-40      200010101      SC VETERAN

Another patient can be selected.

Select Patient:  <RET>

DEVICE: HOME// <RET>
```

### *Printed Summary examples*

Printouts (on paper or screen) are depicted here in double-lined boxes:

```

10/11/94 16:03
***** CONFIDENTIAL OUTPATIENT SUMMARY *****
WEIGHTS,TOM      200-01-0101      SURG-ICU      DOB: 10/03/40



----- DEM - Demographics -----
                Address: HOLLYWOOD & VINE      Phone: 703-450-8010
                        PARIS, TEXAS 23077      County: FAIRFAX
```


### *User responses*


In computer dialogues, user responses are in boldface type.

```
Select NEW PERSON NAME: GRIN,JON
```

### *Explanations*

Special notes in the manual text are preceded by “ **Note:**” and are in a lower font size. If a special note is needed inside a computer dialogue screen, it is preceded by an arrow (). The following are examples of marked notes:

 **Note:** A list must be defined before you can use this option.

```
OCCURRENCE LIMIT: 10// <RET>  A return entered here causes the default
to be accepted!
```

### *Points of Interest*

Points about a feature that need highlighting are preceded by this flag.

# **Chapter 2: Using Health Summary**

## ***Basic Features***

- 1. Patient Health Summary**
- 2. Ad Hoc Health Summary**
- 3. Range of Dates Patient Health Summary**
- 4. Visit Patient Health Summary**
- 5. Hospital Location Health Summary**
- 6. Information Menu**
- 7. CPRS Reports Tab 'Health Summary Types List' Menu**





# Using Health Summary—Basic Features

---

Chapter 2 describes how to use the basic features of the Health Summary package — displaying and printing pre-defined health summaries or ad hoc health summaries.

## Health Summary Menu

This menu contains the basic Health Summary options that let you display or print Health Summaries. It also contains an Information sub-menu that lets you look up information about Health Summary types, components, or other items.

- 1 Patient Health Summary
- 2 Ad Hoc Health Summary
- 3 Range of Dates Patient Health Summary
- 4 Visit Patient Health Summary
- 5 Hospital Location Health Summary
- 6 Information Menu ...
7. CPRS Reports Tab 'Health Summary Types List' Menu...

On the following pages we describe, step-by-step, how to use these options.

## 1. Patient Health Summary Option

### Displaying or Printing a Health Summary

Use the Patient Health Summary option to display or print a health summary for one or more patients, or a group of patients by location, such as the operating room, ward, or clinic. The health summary (in display or print format) contains patient information provided by *components* designated in the health summary *type*.


#### Definitions

|                           |   |
|---------------------------|---|
| <i>Component</i>          | Summarized patient data extracted from various VISTA software packages.   |
| <i>Type</i>               | A structure or template containing defined components and unique characteristics. Contact your Health Summary Coordinator if you need certain components added to a particular health summary type or a specific health summary type created for your needs. You can request creation of a new health summary type by using the form "Request for New Health Summary Type," in Appendix A of this manual. |
| <i>Selected component</i> | Indicates that a user can choose any number of <i>selection items</i> (e.g., tests, measurements, or procedures) available in the Laboratory, Nursing (Vital Signs), Radiology, and Patient Care Encounter (PCE) packages.  |

Before you use this option, you need to know the following:

- a) The *health summary type* that will provide the patient information you need. Four SAMPLE types are distributed with the package for sites to use as guidelines in developing their own types. For a list of available types at your site, enter a ? at the "Select Health Summary Type:" prompt (the first prompt when you enter this option, as shown in the example on the next page).

- b) The *patient(s) name*.


 **Note:** You may identify a patient by entering information other than the patient's name. You may also identify patients by entering their Date of Birth, SSN, Ward Location, or Room-Bed, at the Select Patient: prompt. If CPRS is available, you can also select multiple patients from a ward, clinic, treating specialty, attending physician, personal, or team list.

- c) Whether you will print the health summary or display it on your computer terminal.

### Steps to Display a Patient Health Summary

1. Select the Patient Health Summary option from your menu.
2. Enter a health summary type name.
3. Enter the names of the patients you plan to display health summaries for.
4. Press <RET> at the DEVICE: HOME// prompt to display the health summary or enter a printer name to print the health summary.

#### *Example of requesting a Health Summary display.*

 **Note:** User responses are shown in bold in examples of computer dialogue.

```
Select Health Summary Type: OUTPATIENT

Select Patient: WEIGHTS, TOM    10-03-40    200010101    SC VETERAN

Another patient can be selected.

Select Patient <RET>
DEVICE: HOME// <RET>
```

5. A health summary similar to the following is displayed on your screen.

```

***** CONFIDENTIAL OUTPATIENT SUMMARY *****
WEIGHTS,TOM      243-23-6572                      DOB: 09/12/44

----- BDEM - Brief Demographics -----

                Address: HOLLYWOOD & VINE                Phone: 920 555 2472
                        LOS ANGELES, CA  94103
    Eligibility: SERVICE CONNECTED 50% to 100%      Age: 50
                                                    Sex: MALE

----- CVP - Past Clinic Visits -----

10/09/95 08:45      BLUE-ORTHOPEDIC-JC
10/03/95 13:00      GREEN-DERMATOLOGY PM-JC
10/03/95 10:00      PSYCHOLOGY L KANTON PHD JC
09/19/95 10:00      PSYCHOLOGY L KANTON PHD JC
09/18/95 09:30      C&L (RICK)
09/12/95 10:00      PSYCHOLOGY M COSTELLO PHD JC

----- BLO - Brief Lab Orders (max 6 occurrences or 1 year) -----

Collection DT Test Name      Specimen      Urgency      Status
09/25/95      GLUCOSE        SERUM        ROUTINE      ORDERED
09/13/95      CHEM 7         SERUM        ROUTINE      COMPLETED
05/22/95      CBC             BLOOD        ROUTINE      PROCESSING

----- SLT - Lab Tests Selected (max 6 occurrences or 1 year) -----
Collection DT  Specimen  Test Name      Result      Units      Ref Range
05/03/95 10:51  SERUM        THEOPHYLLINE    11.9        ug/ml      10 - 20
04/29/95 16:51  SERUM        CHLORIDE        100          ug/ml      10 - 20
03/24/95 16:26  SERUM        THEOPHYLLINE    6.6 L        ug/ml      10 - 20

-----CLINICAL MAINTENANCE REMINDERS -----
                LAST      NEXT
CHOLESTEROL    9/12/95      DUE NOW
BLOOD PRESS    9/12/95      DUE NOW
SMOKING EDU    9/12/95      DUE NOW
WEIGHT         9/12/95      DUE NOW

* END *
Press <RET> to continue, ^ to exit component, or select component: ^

```

### Points of Interest

- This example uses a fictitious health summary type called OUTPATIENT.
- The health summary type selected, in this case OUTPATIENT, determines which components are displayed (e.g., Past Clinic Visits), their component order (summary order), and component characteristics.

- The health summary type also determines *maximum occurrences, time limits, Hospital Location Display, ICD Text Display, and Provider Narrative Display*. Data within a component is displayed with the most recent data first.
- The three entries displayed in the Lab Orders component for patient Tom S. Weights occur within a one-year period. If there are more than six lab orders, only the six most recent orders are displayed.
- Selection items are identified for the Lab Tests Selected component and Clinical Maintenance Reminders component. The OUTPATIENT health summary type determines the selection items included.
- The word CONFIDENTIAL always precedes the name of the health summary type in the display or the printed copy, and the word SUMMARY follows the summary type. *All health summaries display or print in an 80-character format.*
- Notifications

You may see a “View Alerts” message while using Health Summary:

|  |
|--|
| DOE,WILLI (D6543): Co-signature required on note(s).<br>APPLESEED (A0009): Unsigned notes.<br>Enter "VA VIEW ALERTS to review alerts |
|--|

This feature is used by packages in VISTA to inform health care team members about a patient's status or that some action needs to be taken. For more information about how to respond to the alerts, refer to the particular package for which the alert is generated.

## 2. Ad Hoc Health Summary Option

This option lets you select any or all health summary components and assign component characteristics for one or more patients. The components selected in this option are **not saved** in a health summary type, but are available only while you are using this option. If you want to re-use this ad hoc health summary, you must request creation of a new health summary type. For more information, see Appendix A of this manual.


### *Steps to use the Ad Hoc Health Summary option:*


1. Select the Ad Hoc Health Summary option from your menu.

```
Select Health Summary Menu Option: A Ad Hoc Health Summary
```

2. A list of components is displayed:

|  |                      |      |                      |      |                      |
|--|----------------------|------|----------------------|------|----------------------|
| CD                                       | Advance Directive    | EM   | Electron Microscopy  | ORC  | Current Orders       |
| BADR                                     | Brief Adv React/All  | MIC  | Microbiology         | ED   | Education            |
| ADR                                      | Adv React/Allerg     | BMIC | Brief Microbiology   | EDL  | Education Latest     |
| CMB                                      | Reminder Brief       | LO   | Lab Orders           | HF   | Health Factors       |
| CR                                       | Reminders Due        | BLO  | Brief Lab Orders     | SHF  | Health Factor Select |
| CM                                       | Reminder Maintenance | SP   | Surgical Pathology   | OE   | Outpatient Encounter |
| CRS                                      | Reminders Summary    | SLT  | Lab Tests Selected   | RXIV | IV Pharmacy          |
| CW                                       | Clinical Warnings    | MAGI | MAG Imaging          | RXOP | Outpatient Pharmacy  |
| CP                                       | Comp. & Pen. Exams   | ADC  | Admission/Discharge  | RXUD | Unit Dose Pharmacy   |
| CNB                                      | Brief Consults       | ADT  | ADT History          | PLA  | Active Problems      |
| CN                                       | Crisis Notes         | EADT | ADT History Expanded | PLL  | All Problems         |
| DI                                       | Dietetics            | CVF  | Fut Clinic Visits    | PLI  | Inactive Problems    |
| DCS                                      | Discharge Summary    | CVP  | Past Clinic Visits   | PN   | Progress Notes       |
| BDS                                      | Brief Disch Summary  | DEM  | Demographics         | BPN  | Brief Progress Notes |
| GAF                                      | Global Assess Funct  | BDEM | Brief Demographics   | SPN  | Selected Prog Notes  |
| II                                       | Imaging Impression   | DS   | Disabilities         | SW   | Social Work          |
| III                                      | Sel Image Impression | DD   | Discharge Diagnosis  | SCD  | Spinal Cord Dysfunct |
| IP                                       | Imaging Profile      | DC   | Discharges           | NSR  | NON OR Procedures    |
| IS                                       | Imaging Status       | PRC  | ICD Procedures       | SRO  | Surgery Only Reports |
| BA                                       | Blood Availability   | OPC  | ICD Surgeries        | SR   | Surgery Rpt (OR/NON) |
| BT                                       | Blood Transfusions   | TR   | Transfers            | BSR  | Brief Surgery Rpts   |
| Press RETURN to continue or '^' to exit: |                      |      |                      |      |                      |
| CH                                       | Chem & Hematology    | TS   | Treating Specialty   | SNSR | Selected NON OR Proc |
| SCLU                                     | Lab Cum Selected     | MEDA | Med Abnormal         | URIN | URINALYSIS           |
| SCL1                                     | Lab Cum Selected 1   | MEDB | Med Brief Report     | VS   | Vital Signs          |
| SCL2                                     | Lab Cum Selected 2   | MEDC | Med Full Captioned   | VSD  | Detailed Vitals      |
| SCL3                                     | Lab Cum Selected 3   | MEDF | Med Full Report      | VSO  | Vital Signs Outpat.  |
| SCL4                                     | Lab Cum Selected 4   | MEDS | Med (1 line) Summary | SVS  | Vital Signs Selected |
| CY                                       | Cytopathology        | MHPE | MH Physical Exam     | SVSO | Vital Select Outpat. |

 **Note:** These are all the components distributed with the Health Summary package. If your display of components looks different from this, your site may have modified the component list, or you may not have the necessary version of a supporting package installed.

 **Further Note:** These components are listed by “Default Header.” For example, “Blood Availability” is the default header name, whereas the component name is LAB BLOOD AVAILABILITY. If you need a more detailed explanation of this, contact your Clinical Coordinator or IRMS.

3. Enter a new set of components. You can enter the abbreviation for that component, the Default Header name, or the actual (Technical) name, as listed above.

```
Select NEW set of COMPONENT(S): ??

The Health Summary components you select at this prompt create an ADHOC
Health Summary

Select ONE or MORE items from the menu, separated by commas.

ALL items may be selected by typing "ALL".

EXCEPTIONS may be entered by preceding them with a minus.
  For example, "ALL,-THIS,-THAT" selects all but "THIS" and "THAT".

NOTE: Menu items are ordered alphabetically by the Component NAME.
      However, the displayed text is the Header Name which generally
      is different from the Component Name. Components may be picked
      by their abbreviation, Header Name, or Component Name.
Redisplay items? YES// NO
Select NEW set of COMPONENT(S): ???


                                Navigation OUTSIDE of Health Summary

You may also enter "^^" followed by the name, partial name or synonym for
any of a variety of options OUTSIDE of Health Summary to which you can
jump. Partial matches will allow you to select from a subset of options.


For example:  ^^?      will list ALL available options.
              ^^PN     will show you all of the PROGRESS NOTES options, or
              ^^OR     will show you all of the ORDER ENTRY options.

You may also order a wide variety of LABORATORY tests using this syntax,
e.g., ^^CHEM 7 will allow you to ADD an order for that test.

Redisplay items? YES//<RET>
Select NEW set of COMPONENT(S): CN,DC,CVF  CRISIS NOTES  MAS DISCHARGES  MAS
CLINIC VISITS FUTURE
```

 **Note:** If the first three characters of an ABBREVIATION HEADER NAME or Component NAME contain “ALL” (not case-sensitive), you can’t enter “ALL” to select all the items on the Ad Hoc Health Summary menu.

| Default Limits and Selection Items                                  |  |              |               |             |             |              |
|---|--|--------------|---------------|-------------|-------------|--------------|
| Component   |  | Occ<br>Limit | Time<br>Limit | Hosp<br>Loc | ICD<br>Text | Prov<br>Narr |
| CN Crisis Notes   |  |              |               |             |             |              |
| DC Discharges   |  | 10           | 1Y            |             |             |              |
| CVF Fut Clinic Visits   |  |              |               |             |             |              |
| Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD: <b>SU</b> |  |              |               |             |             |              |
| 1 Surgery Reports   |  |              |               |             |             |              |
| 2 Surgical Pathology  |  |              |               |             |             |              |
| CHOOSE 1-2: <b>1</b> Surgery Reports                                |  |              |               |             |             |              |
| Surgery Reports   |  |              |               |             |             |              |

 **Note:** Default values are provided for Time and Occurrence Limits, Hospital Location Display, ICD Text Display, Provider Narrative Display, and Display Header Selection Items for most components. To change the component's defaults, enter the component name(s) at the "Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD:" prompt, and then edit as necessary. You may also add more components at this prompt and edit their defaults.

4. Enter time and occurrence limits and Header Name. Where applicable, Hospital Location Display, ICD Text Display, and Provider Narrative Display defaults may also be changed here.

```

OCCURRENCE LIMIT: 10// <RET> .
TIME LIMIT: 1Y// <RET>
HEADER NAME: Surgery Reports

```

5. Enter additional components, if desired, with time and occurrence limits for each. Press Enter or <RET> if you don't want to enter more components or edit the components you have entered.

```

Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD: DC DISCHARGES

Discharges
OCCURRENCE LIMIT: 10// 4
TIME LIMIT: 1Y// 2Y
HEADER NAME: <RET>

Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD: <RET>

Would you like to see Component Limits and Selection Items again? (Y/N):
N// Y YES

```



| Default Limits and Selection Items |           |            |          |          |           |                   |
|------------------------------------|-----------|------------|----------|----------|-----------|-------------------|
| Component                          | Occ Limit | Time Limit | Hosp Loc | ICD Text | Prov Narr | Selection Item(s) |
| CN Crisis Notes                    |           |            |          |          |           |                   |
| DC Discharges                      | 4         | 2Y         |          |          |           |                   |
| CVF Fut Clinic Visits              |           |            |          |          |           |                   |
| SR Surgery Reports                 | 10        | 1Y         |          |          |           |                   |

Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD: **BLO** Brief Lab Orders

Brief Lab Orders  
 OCCURRENCE LIMIT: 10  
 TIME LIMIT: 1Y  
 HEADER NAME: <RET>

6. Enter the patient names for this health summary.

7. Press <RET> at the DEVICE: HOME// prompt to display the health summary or enter a printer name to print a paper copy.

Select COMPONENT(S) to EDIT or other COMPONENT(S) to ADD: <RET>

Would you like to see Component Limits and Selection Items again?(Y/N):NO//  
**NO**

Select Patient: WEIGHTS,TOM

Another Patient can be selected

Select Patient: <RET>  
 Device: HOME// <RET>

8. The following ad hoc health summary is displayed:

|  |             |                             |               |                |  |       |  |
|--|-------------|-----------------------------|---------------|----------------|--|-------|--|
| *****  |             | CONFIDENTIAL AD HOC SUMMARY |               | 06/14/95 10:33 |  | ***** |  |
| WEIGHTS,TOM  | 200-01-0101 | SURG-ICU                    | DOB: 10/03/50 |                |  |       |  |
| ----- CN - Crisis Notes -----                              |             |                             |               |                |  |       |  |
| No data available  |             |                             |               |                |  |       |  |
| ----- DC - Discharges (max 4 occurrences or 2 years) ----- |             |                             |               |                |  |       |  |
| Date of Discharge: 03/30/95                                |             |                             |               |                |  |       |  |
| DXLS: MAL NEO SKIN FACE NECK                               |             |                             |               |                |  |       |  |
| Bedsection: PLASTIC SURG, INC HEAD/CHEST                   |             |                             |               |                |  |       |  |
| Disposition Type: REGULAR                                  |             |                             |               |                |  |       |  |
| Disposition Place: RETURN TO COMMUNITY                     |             |                             |               |                |  |       |  |
| Outpatient Treatment: YES                                  |             |                             |               |                |  |       |  |
| ----- CVF- Fut Clinic Visits -----                         |             |                             |               |                |  |       |  |

```

12/19/95  10:00          DERMATOLOGY AM-JC          INPATIENT APPOINTMENT
01/15/96  11:30          NEUROLOGY (RETURN VISIT)-JC

Press <RET> to continue, ^ to exit, or select component:  <RET>

----- SR - Surgery Reports (max 10 occurrences or 1 year) -----

01/18/95          THORACIC SURGERY          Surgeon:  KILDAIRE,KEN
Status:          NOT COMPLETE
Pre Op Diag:  LUMP DETECTED IN CHEST
Post Op Diag:  LUMP DETECTED
CPT Op Code:  19260 - REMOVE TUMOR
Surgeon's Dictation:      The presence of a large lump was discovered
                           during a routine physical exam. X-ray
                           revealed that the lump may be cancerous. Pt.
                           was prepped for surgery and anesthetised,
                           draped and intubated. I removed a large (10
                           cm) mass of tumorous tissue which I sent to
                           the Lab. Wound was sutured and a clean
                           dressing applied.

----- BLO - Lab Orders Brief (max 10 occurrences or 1 year) -----

Collection DT    Test Name                Specimen        Urgency        Status
02/20/95 16:28  GLUCOSE                SERUM           ROUTINE        COMPLETED
02/20/95 14:12  C & S                  FECES           ROUTINE        COMPLETED
02/20/95 14:12  AFB CULTURE & SMEAR    UNKNOWN        ROUTINE        COMPLETED
02/20/95 14:12  PARASITE EXAM          UNKNOWN        ROUTINE        COMPLETED
02/14/95 15:50  PH                     BLOOD          ROUTINE        PROCESSING
02/14/95 11:21  GLUCOSE                SERUM           ROUTINE        PROCESSING
02/14/95 10:59  GLUCOSE                SERUM           ROUTINE        PROCESSING
02/14/95 10:59  HCT                    BLOOD          ROUTINE        PROCESSING
02/14/95 10:52  GLUCOSE                SERUM           ROUTINE        PROCESSING
02/14/95 10:52  HCT                    BLOOD          ROUTINE        PROCESSING

* END *
Press <RET> to continue, ^ to exit component, or select component:  ^

```

### 3. Range of Dates Patient Health Summary

This option lets you print health summaries of a specified, pre-defined health summary type for multiple patients. After patients are selected, you can pick a date range. Data for summaries is based on the date range. This date range overrides time limits for components which allow this option.

#### Steps to print a Range of Dates Patient Health Summary

1. Select the Range of Dates Patient Health Summary option from your menu.
2. Enter a health summary type name.
3. Enter the names of patients you plan to print a Health Summary for.
4. Enter beginning and ending dates.
5. Press <RET> at the DEVICE: HOME// prompt to display the health summary or enter a printer name to print the health summary.

```
Select Health Summary Menu Option: ?

1      Patient Health Summary
2      Ad Hoc Health Summary
3      Range of Dates Patient Health Summary
4      Visit Patient Health Summary
5      Hospital Location Health Summary
6      Information Menu ...
7.     CPRS Reports Tab 'Health Summary Types List' Menu..

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.

Select Print Health Summary Menu Option: 3  Range of Dates Patient Health
Summary

Select Health Summary Type:  SAMPLE 1

Select Patient:      WEIGHTS, TOM.      09-12-44      243236572      SC VETERAN

Another patient(s) can be selected.

Select Patient: <RET>

Enter Beginning Date (MM/DD/YY):  T-30
Enter Ending Date (MM/DD/YY):  TODAY// <RET>  (SEP 05, 2001)

DEVICE: HOME// <RET>  VAX
```


A health summary for the specified dates will be displayed on your screen.

## 4. Visit Patient Health Summary

This option lets you print health summaries of a specified, pre-defined health summary type for multiple patients. After a patient is selected, you can pick an outpatient visit or an inpatient hospital admission. If the Patient Care Encounter (PCE) package isn't installed, you can only choose an inpatient visit. Data for summaries is based on a date range from the outpatient visit or inpatient admission. This date range overrides time limits for components which allow this option.

### Steps to print a Visit Patient Health Summary

1. Select the Visit Patient Health Summary option from your menu.
2. Enter a health summary type name.
3. Enter the name of the patient you plan to print a health summary for. (You can select other patients after you have specified the visit date for this patient.)
4. Specify whether you want an outpatient visit or an admission and then choose the entry.
5. Answer yes if you wish to include the Outpatient Pharmacy Action Profile.

 **NOTE:** This prompt appears only if the site parameter "Prompt for action profiles" is enabled.

6. Press <RET> at the DEVICE: HOME// prompt to display the health summary or enter a printer name to print the health summary.

## Visit Patient Health Summary

```
Select Health Summary Menu Option: ?

1      Patient Health Summary
2      Ad Hoc Health Summary
3      Range of Dates Patient Health Summary
4      Visit Patient Health Summary
5      Hospital Location Health Summary
6      Information Menu ...
7.     CPRS Reports Tab 'Health Summary Types List' Menu...

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.
Select Print Health Summary Menu Option: 4 Visit Patient Health Summary
Select Health Summary Type: SAMPLE 1 SAMPLE 1
Select Patient: WEIGHTS,TOM 09-12-44 243236572 SC VETERAN

      Select one of the following:

          1      Outpatient Visit Date
          2      Admission Date


Enter response: 2 Admission Date

          ADMISSION DATE/TIME          DISCHARGE DATE/TIME

          1      8/16/94 8:35 am          8/19/94 3:21:31 pm
          2      7/22/91 10:01:23 am      2/17/94 1:00 pm

Enter a number between 1 and 2: 2

Select Another Patient: <RET>
Include Outpatient Pharmacy Action Profile (Y/N)? NO// YES
DEVICE: HOME// PRINTERNAME
```

 **Note:** It is preferable to send the Health Summary to a printer rather than your terminal screen when Action Profiles are included.

**Printed Health Summary Example**

```

Printed for data from 07/22/91 to 02/17/94                                08/23/95 07:37
***** CONFIDENTIAL SAMPLE 1 SUMMARY *****
WEIGHTS,TOM      243-23-6572                                DOB: 09/12/44

----- BDEM - Brief Demographics -----

                Address: HOLLYWOOD & VINE                        Phone: 920 555 2472
                      LOS ANGELES, CA  94103
    Eligibility: SERVICE CONNECTED 50% to 100%                Age: 50
                                                                Sex: MALE

----- BLO - Brief Lab Orders (max 10 occurrences) -----

Collection DT    Test Name                Specimen        Urgency        Status
04/13/93 11:00   CBC                        BLOOD            ROUTINE        ORDERED
04/13/93 11:00   GLUCOSE                     SERUM            ROUTINE        ORDERED
03/16/93 09:35   GLUCOSE                     SERUM            ROUTINE        COMPLETED
03/16/93 09:31   CHEM 7                      SERUM            ROUTINE        COMPLETED
03/16/93 09:30   GLUCOSE                     SERUM            ROUTINE        COMPLETED
03/16/93 09:28   CHEM 7                      SERUM            ROUTINE        COMPLETED
03/16/93 09:14   CHEM 7                      SERUM            ROUTINE        COMPLETED
03/16/93 09:14   CHEM 7                      SERUM            ROUTINE        COMPLETED
03/16/93 08:54   CHEM 7                      SERUM            ROUTINE        COMPLETED
03/16/93 08:52   CHEM 7                      SERUM            ROUTINE        COMPLETED

----- BMIC - Brief Microbiology (max 10 occurrences) -----

No data available

----- BSR - Brief Surgery Rpts (max 10 occurrences) -----

No data available

----- RS - Radiology Status (max 10 occurrences) -----

Request DT    Status  Procedure                Scheduled DT    Provider
04/08/93      p      ANKLE 2 VIEWS                MARMROSE,CARY
04/08/93      p      CHEST 2 VIEWS PA&LAT        MARMROSE,CARY
04/01/93      p      CHEST 2 VIEWS PA&LAT        MARMROSE,CARY
03/15/93      p      CHEST 2 VIEWS PA&LAT        ANDERSON,CURTI

----- SCLU - Lab Cum Selected (max 10 occurrences) -----

No selection items chosen for this component.

----- DC - Discharges (max 10 occurrences) -----

    Date of Discharge: 02/17/94
          Bedsection: INTERMEDIATE MEDICINE
    Disposition Type: NON-SERVICE CONNECTED (OPT-NSC)
    Disposition Place: UNKNOWN
    Outpatient Treatment: UNKNOWN

* END *
Press <RET> to continue, ^ to exit, or select component:

```



## 5. Hospital Location Health Summary

This option lets you print or display on your screen health summaries for all patients at specific or multiple hospital locations (ward, clinic, or operating room).

You can also include an Outpatient Pharmacy Action Profile print of the patients at any of the locations you select. These profiles are printed in tandem with the selected health summary type for selected patient locations. For example, John Doe's health summary will print, and then his action profile, etc.

If the hospital location you specify is a clinic or operating room location (for example, Oncology or OR1), you will need to enter both a beginning and ending visit date or surgery date for that clinic or operating room location.

### *Steps to use option:*

1. Select the Hospital Location Health Summary option from your menu.

```
Select Health Summary User Menu Option: Hospital Location Health  
Summary
```

2. Select the health summary type.

The default is the last summary type you requested. You can enter a new summary type name, title, or owner.

```
Select Health Summary Type: OUTPATIENT// <RET>
```


3. Select one or more hospital locations.

Enter ? to see a list of hospital locations. Select from the list. You will be prompted sequentially for each location.

```
Select Hospital Location: 1A  
Select Next Hospital Location: Orthopedic  
Select Next Hospital Location: <RET>
```



#### 4. Answer yes if you wish to include the Outpatient Pharmacy Action Profile.

 **NOTE:** This prompt appears only if the site parameter “Prompt for action profiles” is enabled.

```
Include Outpatient Pharmacy Action Profile (Y/N)? NO// <RET>
```

#### 5. Enter the beginning and ending visit or surgery dates.

If you enter a clinic or operating room location above, you will get these prompts.

```
Please enter the beginning Visit or Surgery date:10/19/95// <RET>
(OCT 19, 1995)
Please enter the ending Visit or Surgery date:10/19/95// T+1 (OCT 19,
1995)
No patients found at Clinic Orthopedic on 10/19/95 to 10/20/95.
Select Hospital Location: <RET>
```

If the system has no record of patients at a selected ward location, a message informs you that no patients were found at that location.

#### 6. Enter <RET> at the DEVICE: prompt to display the health summary on your screen or enter a printer name.

#### *Points of Interest:*

1. If there are no patients at the location you enter, you are told there are no patients and returned to the “Select Hospital Location:” prompt for another choice.
2. Enter a single ^ at the “Select Hospital Location:” prompt to select another health summary type.
3. If you enter a single ^ at the bottom of the screen in a health summary, you will see the next patient’s health summary at that location. If no other patients exist, you are returned to the “Select Hospital Location:” prompt.

^^ will exit you from viewing the selected Health Summaries.

## 6. Information Menu

This option contains five information options that let you print lists or get information about health summary types and components.

- 1 Inquire about a Health Summary Type
- 2 List Health Summary Types
- 3 Inquire about a Health Summary Component
- 4 List Health Summary Components
- 5 List Health Summary Component Descriptions

### *Inquire about a Health Summary Type*

This option provides you with a detailed list of components contained in a health summary type. The information in this inquiry includes the component's abbreviation, component order in the summary (summary order), component name, maximum occurrence limits, time limits, Hospital Location Display, ICD Text Display, Provider Narrative Display, and selection criteria.

#### *Steps to use option:*

1. Select Inquire about a Health Summary Type from your Information Menu.

```
Select Health Summary Menu Option: Information Menu

    1 Inquire about a Health Summary Type
    2 List Health Summary Types
    3 Inquire about a Health Summary Component
    4 List Health Summary Components
    5 List Health Summary Component Descriptions

Select Information Menu Option: INQ
    1 Inquire about a Health Summary Type
    2 Inquire about a Health Summary Component
CHOOSE 1-2: 1
```

2. Select the Health Summary Type you want information about.

```
Select Health Summary Type: ?
ANSWER WITH HEALTH SUMMARY TYPE LOCATION(S) USING THE SUMMARY,
OR
    TITLE, OR OWNER
CHOOSE FROM:
    SAMPLE 1
    SAMPLE 2
    SAMPLE 3    GMTS HS ADHOC OPTION
Select Health Summary Type Name: SAMPLE 2
```

3. Select the printer you want to print to, or press return if you want a screen display.

```
DEVICE: <RET>
```

4. A report similar to the following is displayed on your screen:

| HEALTH SUMMARY TYPE INQUIRY                |       |                     |     |               |      |      |           |
|--|-------|---------------------|-----|---------------|------|------|-----------|
| Type Name: SAMPLE 2                        |       |                     |     | Lock: GMTSMGR |      |      |           |
| Title:                                     |       |                     |     |               |      |      |           |
| Owner: POSTMASTER                          |       |                     |     |               |      |      |           |
| SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: |       |                     |     |               |      |      |           |
|  |       |                     | Max | Hosp          | ICD  | Prov |           |
| Abb.                                       | Order | Component Name      | Occ | Time Loc      | Text | Narr | Selection |
| -----                                      |       |                     |     |               |      |      |           |
| DEM  | 5     | Demographics        |     |               |      |      |           |
| ADR  | 10    | Adv React/Allerg    |     |               |      |      |           |
| CN   | 15    | Crisis Notes        |     |               |      |      |           |
| CW   | 20    | *Clinical Warnings  |     |               |      |      |           |
| LO   | 25    | Lab Orders          | 10  |               |      |      |           |
| CH   | 30    | Chem & Hematology   | 10  | 1Y            |      |      |           |
| SCLU                                       | 35    | Lab Cum Selected    | 10  | 1Y            |      |      |           |
| SLT  | 40    | Lab Tests Selected  | 10  | 1Y            |      |      |           |
| MIC  | 45    | Microbiology        | 10  | 1Y            |      |      |           |
| CY   | 50    | Cytopathology       | 10  | 1Y            |      |      |           |
| SP   | 55    | Surgical Pathology  | 10  | 2Y            |      |      |           |
| BA   | 60    | Blood Availability  | 10  | 1Y            |      |      |           |
| BT   | 65    | Blood Transfusions  | 10  | 1Y            |      |      |           |
| RXUD                                       | 70    | Unit Dose Pharmacy  |     | 1Y            |      |      |           |
| RXIV                                       | 75    | IV Pharmacy         |     | 6M            |      |      |           |
| RP   | 80    | Radiology Profile   | 10  | 1Y            |      |      |           |
| OPC  | 85    | ICD Surgeries       | 10  | 1Y            |      |      |           |
| PRC  | 90    | ICD Procedures      | 10  | 1Y            |      |      |           |
| MED  | 95    | Medicine Summary    | 10  | 1Y            |      |      |           |
| SR   | 100   | Surgery Reports     | 10  | 1Y            |      |      |           |
| PN   | 105   | Progress Notes      | 10  | 1Y            |      |      |           |
| ADC  | 110   | Admission/Discharge | 10  | 3Y            |      |      |           |
| TS   | 115   | Treating Specialty  | 10  | 1Y            |      |      |           |
| TR   | 120   | Transfers           | 10  | 1Y            |      |      |           |
| DC   | 125   | Discharges          | 10  | 1Y            |      |      |           |
| * = Disabled Components                    |       |                     |     |               |      |      |           |

**List Health Summary Types**

This option provides you with a list of all health summary types currently defined on your system, indicates the person designated as the *owner* of a health summary type, and whether a lock is required to edit a health summary type. This list can be displayed on your screen or printed.

The *owner* listing tells you who created a health summary type and the *lock* listing tells you if a key is required for editing/deleting a health summary type.

**Steps to use option:**

1. Select List Health Summary Types from your Information Menu.

Select Information Menu Option: **List Health Summary Types**

3. Select the printer you want to print to, or press return if you want a screen display.

DEVICE: <RET>

4. A list similar to the following is displayed on your screen:

| HEALTH SUMMARY TYPE LIST |                | JUL 31, 2001 | 12:18   | PAGE 1 |
|--------------------------|----------------|--------------|---------|--------|
| Health Summary Type      | Owner          |              | Lock    |        |
| -----                    |                |              |         |        |
| AAS                      | ACCOUNT, CHIEF |              |         |        |
| AC CLINICAL SUMMARY      | ACCOUNT, CHIEF |              |         |        |
| ACTIVE PROBLEMS          | ACCOUNT, CHIEF |              |         |        |
| GMTS HS ADHOC OPTION     | POSTMASTER     |              | GMTSMGR |        |
| SAMPLE 1                 | POSTMASTER     |              | GMTSMGR |        |
| SAMPLE 2                 | POSTMASTER     |              | GMTSMGR |        |
| SAMPLE 3                 | POSTMASTER     |              | GMTSMGR |        |
| SAMPLE 4                 | POSTMASTER     |              | GMTSMGR |        |
| DR. JONES                | JONES, DR.     |              |         |        |
| HTN CLINIC               | WELBY, J.      |              |         |        |

### *Inquire about a Health Summary Component*

This option provides you with details about an individual component, including Abbreviation, Time and Occurrence Limits, Display Name, Hospital Location Display, ICD Text Display, Provider Narrative Display, Selection Item, Disabled message, and a complete description of the information contained in the component.

1. Select Inquire about a Health Summary Component from your Information Menu.

```
Select Information Menu Option:  INQ
1   Inquire about a Health Summary Type
2   Inquire about a Health Summary Component
CHOOSE 1-2:  2 Inquire about a a Health Summary Component

Select Health Summary Component Name:  DEM
```

2. Select the printer you want to print to, or press return if you want a screen display.

```
DEVICE:  HOME//  <RET>
```

3. A list similar to the following is displayed on your screen:

```

                                HEALTH SUMMARY COMPONENT INQUIRY

                                Component Name:  MAS DEMOGRAPHICS
                                Display Name:    Demographics
                                Abbreviation:    DEM
                                Time Limits Apply: NO
                                Max Occurrences Apply: NO
                                Hospital Location Display Apply: NO
                                ICD Text Display Apply: NO
                                Provider Narrative Display Apply: NO
                                Component Disabled: NO

                                Description:

                                This component contains the following patient
                                demographic data (if available) from the MAS package:
                                address, phone, county, marital status, religion, age,
                                sex, occupation, period of service, POW status (e.g.,
                                Y or N), branch of service, combat status (e.g., Y or
                                N), eligibility code, current (verified) eligibility
                                status, service connected %, mean test, next of kin
                                (NOK), NOK phone number and address.
```

### ***List Health Summary Components***

This option produces a complete list of all health summary components and indicates each component's abbreviation, occurrence limit, time limit, hospital location displayed, ICD text displayed, provider narrative displayed, and whether or not the component has been marked as disabled.

1. Select List Health Summary Components from the Information Menu.

```
Select Information Menu Option: List
  1 List Health Summary Component Descriptions
  2 List Health Summary Components
  3 List Health Summary Types
CHOOSE 1-3: 2
```

2. Select the printer you want to print to, or press return if you want a screen display.

```
DEVICE: HOME// <RET>
```

3. The following list is displayed on your screen:

| HEALTH SUMMARY COMPONENT LIST |       |         |         | JUL 31,2001 12:27 |       | PAGE 1 |           |
|-------------------------------|-------|---------|---------|-------------------|-------|--------|-----------|
| Component                     |       | Occur.  | Time    | Hosp.             | ICD   | Prov.  |           |
| Name                          | Abbr. | Limits? | Limits? | Loc.?             | Text? | Narr.? | Disabled? |
| -----                         |       |         |         |                   |       |        |           |
| Advance Directive             | CD    |         |         |                   |       |        |           |
| Brief Adv React/All           | BADR  |         |         |                   |       |        |           |
| Adv React/Allergy             | ADR   |         |         |                   |       |        |           |
| Reminder Brief                | CMB   |         |         |                   |       |        |           |
| Reminders Due                 | CR    |         |         |                   |       |        |           |
| Reminder Maintenance          | CM    |         |         |                   |       |        |           |
| Reminders Summary             | CRS   |         |         |                   |       |        |           |
| Clinical Warnings             | CW    |         |         |                   |       |        |           |
| Comp. & Pen. Exams            | CP    | yes     | yes     |                   |       |        |           |
| Brief Consults                | CNB   | yes     | yes     |                   |       |        |           |
| Crisis Notes                  | CN    |         |         |                   |       |        |           |
| Dietetics                     | DI    | yes     | yes     |                   |       |        |           |
| Discharge Summary             | DCS   | yes     | yes     |                   |       |        |           |
| Brief Disch Summary           | BDS   | yes     | yes     |                   |       |        |           |
| Global Assess Funct           | GAF   | yes     | yes     |                   |       |        |           |
| Imaging Impression            | II    | yes     | yes     |                   |       |        |           |
| Sel Image Impression          | SII   | yes     | yes     |                   |       |        |           |
| Imaging Profile               | IP    | yes     | yes     |                   |       |        |           |
| Imaging Status                | IS    | yes     | yes     |                   |       |        |           |
| Blood Availability            | BA    | yes     | yes     |                   |       |        |           |
| Blood Transfusions            | BT    | yes     | yes     |                   |       |        |           |
| Chem & Hematology             | CH    | yes     | yes     |                   |       |        |           |
| Lab Cum Selected              | SCLU  | yes     | yes     |                   |       |        |           |
| Lab Cum Selected 1            | SCL1  | yes     | yes     |                   |       |        |           |
| Lab Cum Selected 2            | SCL2  | yes     | yes     |                   |       |        |           |


# Information Menu

| HEALTH SUMMARY COMPONENT LIST |       |         |         | JUL 31, 2001 | 12:27 | PAGE 1 |           |
|-------------------------------|-------|---------|---------|--------------|-------|--------|-----------|
| Component                     |       | Occur.  | Time    | Hosp.        | ICD   | Prov.  |           |
| Name                          | Abbr. | Limits? | Limits? | Loc.?        | Text? | Narr.? | Disabled? |
| Lab Cum Selected 3            | SCL3  | yes     | yes     |              |       |        |           |
| Lab Cum Selected 4            | SCL4  | yes     | yes     |              |       |        |           |
| Cytopathology                 | CY    | yes     | yes     |              |       |        |           |
| Electron Microscopy           | EM    | yes     | yes     |              |       |        |           |
| Microbiology                  | MIC   | yes     | yes     |              |       |        |           |
| Brief Microbiology            | BMIC  | yes     | yes     |              |       |        |           |
| Lab Orders                    | LO    | yes     | yes     |              |       |        |           |
| Brief Lab Orders              | BLO   | yes     | yes     |              |       |        |           |
| Surgical Pathology            | SP    | yes     | yes     |              |       |        |           |
| Lab Tests Selected            | SLT   | yes     | yes     |              |       |        |           |
| MAG Imaging                   | MAGI  | yes     | yes     |              |       |        |           |
| Admission/Discharge           | ADC   | yes     | yes     |              |       |        |           |
| ADT History                   | ADT   | yes     | yes     |              |       |        |           |
| ADT History Expanded          | EADT  | yes     | yes     |              |       |        |           |
| Fut Clinic Visits             | CVF   |         |         |              |       |        |           |
| Past Clinic Visits            | CVP   | yes     | yes     |              |       |        |           |
| Demographics                  | DEM   |         |         |              |       |        |           |
| Brief Demographics            | BDEM  |         |         |              |       |        |           |
| Disabilities                  | DS    |         |         |              |       |        |           |
| Discharge Diagnosis           | DD    | yes     | yes     |              |       |        |           |
| Discharges                    | DC    | yes     | yes     |              |       |        |           |
| ICD Procedures                | PRC   | yes     | yes     |              |       |        |           |
| ICD Surgeries                 | OPC   | yes     | yes     |              |       |        |           |
| Transfers                     | TR    | yes     | yes     |              |       |        |           |
| Treating Specialty            | TS    | yes     | yes     |              |       |        |           |
| Med Abnormal                  | MEDA  | yes     | yes     |              |       |        |           |
| Med Brief Report              | MEDB  | yes     | yes     |              |       |        |           |
| Med Full Captioned            | MEDC  | yes     | yes     |              |       |        |           |
| Med Full Report               | MEDF  | yes     | yes     |              |       |        |           |
| Med (1 line) Summary          | MEDS  | yes     | yes     |              |       |        |           |
| MH Physical Exam              | MHPE  | yes     | yes     |              |       |        |           |
| Oncology                      | ONC   |         |         |              |       |        | temporary |
| Current Orders                | ORC   |         | yes     |              |       |        |           |
| Education                     | ED    | yes     | yes     |              |       |        |           |
| Education Latest              | EDL   |         | yes     |              |       |        |           |
| Exams Latest                  | EXAM  |         | yes     |              |       |        | permanent |
| Health Factors                | HF    | yes     | yes     |              |       |        |           |
| Health Factor Select          | SHF   | yes     | yes     |              |       |        |           |
| Immunizations                 | IM    |         |         |              |       |        | permanent |
| Location of Home              | LH    |         |         |              |       |        | permanent |
| Non-Tabular Measurem          | NTM   | yes     | yes     |              |       |        | permanent |
| Measurement Selected          | MEAS  | yes     | yes     |              |       |        | permanent |
| Outpatient Diagnosis          | OD    | yes     | yes     | yes          | yes   | yes    | permanent |
| Outpatient Encounter          | OE    | yes     | yes     | yes          | yes   | yes    |           |
| Skin Tests                    | ST    |         |         |              |       |        | permanent |
| Treatments Provided           | TP    | yes     | yes     |              |       |        | permanent |
| IV Pharmacy                   | RXIV  |         | yes     |              |       |        |           |
| Outpatient Pharmacy           | RXOP  |         | yes     |              |       |        |           |
| Unit Dose Pharmacy            | RXUD  |         | yes     |              |       |        |           |
| Active Problems               | PLA   |         |         |              | yes   | yes    |           |
| All Problems                  | PLL   |         |         |              | yes   | yes    |           |
| Inactive Problems             | PLI   |         |         |              | yes   | yes    |           |
| Progress Notes                | PN    | yes     | yes     |              |       |        |           |
| Brief Progress Notes          | BPN   | yes     | yes     |              |       |        |           |

| HEALTH SUMMARY COMPONENT LIST         |       |         |         | JUL 31, 2001 12:27 |       | PAGE 1 |           |
|---------------------------------------|-------|---------|---------|--------------------|-------|--------|-----------|
| Component                             |       | Occur.  | Time    | Hosp.              | ICD   | Prov.  |           |
| Name                                  | Abbr. | Limits? | Limits? | Loc.?              | Text? | Narr.? | Disabled? |
| -----                                 |       |         |         |                    |       |        |           |
| Selected Prog Notes                   | SPN   | yes     | yes     |                    |       |        |           |
| Social Work                           | SW    |         |         |                    |       |        |           |
| Spinal Cord Dysfunct                  | SCD   | yes     | yes     |                    |       |        |           |
| NON OR Procedures                     | NSR   | yes     | yes     |                    |       |        |           |
| Surgery Only Reports                  | SRO   | yes     | yes     |                    |       |        |           |
| Surgery Rpt (OR/NON)                  | SR    | yes     | yes     |                    |       |        |           |
| Brief Surgery Rpts                    | BSR   | yes     | yes     |                    |       |        |           |
| Selected NON-OR Proc                  | SNSR  | yes     | yes     |                    |       |        |           |
| URINALYSIS                            | URIN  | yes     | yes     |                    |       |        |           |
| Vital Signs                           | VS    | yes     | yes     |                    |       |        |           |
| Detailed Vitals                       | VSD   | yes     | yes     |                    |       |        |           |
| Vital Signs Outpat.                   | VSO   | yes     | yes     |                    |       |        |           |
| Vital Signs Selected                  | SVS   | yes     | yes     |                    |       |        |           |
| Vital Select Outpat.                  | SVSO  | yes     | yes     |                    |       |        |           |
| Select Information Menu Option: <RET> |       |         |         |                    |       |        |           |

### List Health Summary Component Descriptions

This option provides you a detailed list of all health summary components.

 **Note:** Although this list can be displayed, it is most beneficial if printed and used as reference material. *Only a small portion of the list is shown in the example below 3/4 complete copy is in Appendix C of this manual.*

#### 1. Select List Health Summary Component Descriptions from the Information Menu.

```

Select Information Menu Option: ?
1      Inquire about a Health Summary Type
2      List Health Summary Types
3      Inquire about a Health Summary Component
4      List Health Summary Components
5      List Health Summary Component Descriptions
CHOOSE 1-5:  5

```

#### 2. Select the printer you want to print to, or press <RET> for a screen display.

```

DEVICE:  PRINTERNAME

```

#### 3. A list similar to the following is printed.



| HEALTH SUMMARY COMPONENT DESCRIPTION LIST   |         | JUL 31,2001 12:31 | PAGE 1 |
|---|---------|-------------------|--------|
| Component   |         |                   |        |
| Name  | Abbrev. |                   |        |
| Description   |         |                   |        |
| -----   |         |                   |        |
| Advance Directive   | CD      |                   |        |
| This component contains advance directive notes entered using the Text Integration Utilities (TIU). Advance Directives are a type a progress note which includes clinical information that clinicians need to be alerted to. Time and maximum occurrent limits apply to this component.   |         |                   |        |
| If this component is printed to either a CRT or another device type, information will include title, text of note, electronic signature block, and date/time posted.  |         |                   |        |
| Brief Adv React/All   | BADR    |                   |        |
| This component provides patient allergy/adverse reaction information from the Allergy Tracking System. It provides a brief patient list of all known food, drug and environmental allergies or adverse reactions (e.g., hay fever).   |         |                   |        |
| Adv React/Allerg  | ADR     |                   |        |
| This component provides patient allergy/adverse reaction information from the Allergy Tracking System. It provides a list of all known food, drug and environmental allergies or adverse reactions (e.g., hay fever). Data element included are type of reaction, mechanism of reaction, causative agent, verification status, signs/symptoms for the reaction, the originator, and comments. |         |                   |        |
| Reminder Brief  | CMB     |                   |        |
| This is a brief version of the CLINICAL REMINDERS MAINTENANCE component.  |         |                   |        |
| Reminders Due   | CR      |                   |        |
| This component lists only clinical reminders that are due now. If the date the reminder was last satisfied is known it is listed under LAST. Otherwise the word unknown is printed.   |         |                   |        |
| Reminder Maintenance  | CM      |                   |        |
| This component lists reminders that are due and not due as does the CRS component. In addition it shows why the reminder is due or not due.   |         |                   |        |
| Reminders Summary   | CRS     |                   |        |
| This component is similar to PCE CLINICAL REMINDERS DUE except that it shows all reminders not just those that are due. The information will include the NEXT due date, or N/A, and the LAST DATE. N/A reminders will be displayed unless the IGONORE ON N/A field is set.  |         |                   |        |

### **CPRS Reports Tab 'Health Summary Types List' Menu**

Use the options in the CPRS Reports Tab 'Health Summary Types List' Menu to select the Health Summary Types to list on the Reports Tab, arrange the order of these Health Summaries on the list, and to the user's preferences.

The CPRS Reports Tab 'Health Summary Types List' Menu contains four options:

- 1 Display 'Health Summary Types List' Defaults
- 2 Precedence of 'Health Summary Types List'
- 3 Method of compiling 'Health Summary Types List'
- 4 Edit 'Health Summary Types List' Parameters

*See Chapter 3, section 4 for more complete descriptions of these options.*

## **Chapter 3: Advanced Features**

- 1. Health Summary Components**
- 2. Health Summary Types**
- 3. Build Health Summary Options**
- 4. User Preferences**



# Health Summary Advanced Features

---

Chapter 3 contains information about creating and modifying Health Summary Types.

## 1. Health Summary Components

A health summary is made up of a series of data groupings called *components*.

A health summary component is summarized patient data extracted from various VISTA software packages. Health summary components contain a variety of patient data, ranging from Allergies to Vital Sign information. Each of the components represents a major class of VISTA data. The health summary component contains pre-determined information, but users who are given the Enhanced Menu can set occurrence and time limits, hospital location, ICD text, provider narrative, selection items, briefness, and the header name.

### Brief, Selected, and Cumulative Selected Components


Health summary has several kinds of specialized components that give narrower views of data. Three of these are *brief*, *selected*, or *cumulative selected*.

A *brief* component is a shortened compilation of data (e.g., Brief Demographics (BDEM)).


A *selected* component indicates that a user can choose any number of selection items (e.g., tests, measurements, or procedures) available in the Laboratory, Nursing (Vital Signs), Radiology, and Patient Care Encounter (PCE) packages. For example, the Selected Lab Tests (SLT) component allows you to select any number of Lab tests, and presents collection date/time, specimen, test name, result, units, and reference range in a vertical format.

Lab Tests Selected, Vital Signs Selected, Radiology Impression Selected, Health Factors Select, and Measurement Selected are the current *selected* components in Health Summary as defined and exported by the package developers.

A *cumulative selected* component allows you to choose cumulative Lab tests, displayed in a horizontal, columnar format. The Lab Cumulative Selected (SCLU) component lets you choose an *unlimited* number of cumulative Lab tests. The Lab Cumulative Selected 1 through Lab Cumulative Selected 4 (SCL1, SCL2, SCL3, SCL4) components limit you to choosing seven cumulative tests each.

 **Note:** If a VistA package is unavailable at your facility, your IRM staff may disable the corresponding components. The following components are available in this version of Health Summary (but may not necessarily be available at your site):


|  |                      |      |                      |      |                      |
|--|----------------------|------|----------------------|------|----------------------|
| CD                                       | Advance Directive    | EM   | Electron Microscopy  | ORC  | Current Orders       |
| BADR                                     | Brief Adv React/All  | MIC  | Microbiology         | ED   | Education            |
| ADR                                      | Adv React/Allerg     | BMIC | Brief Microbiology   | EDL  | Education Latest     |
| CMB                                      | Reminder Brief       | LO   | Lab Orders           | HF   | Health Factors       |
| CR                                       | Reminders Due        | BLO  | Brief Lab Orders     | SHF  | Health Factor Select |
| CM                                       | Reminder Maintenance | SP   | Surgical Pathology   | OE   | Outpatient Encounter |
| CRS                                      | Reminders Summary    | SLT  | Lab Tests Selected   | RXIV | IV Pharmacy          |
| CW                                       | Clinical Warnings    | MAGI | MAG Imaging          | RXOP | Outpatient Pharmacy  |
| CP                                       | Comp. & Pen. Exams   | ADC  | Admission/Discharge  | RXUD | Unit Dose Pharmacy   |
| CNB                                      | Brief Consults       | ADT  | ADT History          | PLA  | Active Problems      |
| CN                                       | Crisis Notes         | EADT | ADT History Expanded | PLL  | All Problems         |
| DI                                       | Dietetics            | CVF  | Fut Clinic Visits    | PLI  | Inactive Problems    |
| DCS                                      | Discharge Summary    | CVP  | Past Clinic Visits   | PN   | Progress Notes       |
| BDS                                      | Brief Disch Summary  | DEM  | Demographics         | BPN  | Brief Progress Notes |
| GAF                                      | Global Assess Funct  | BDEM | Brief Demographics   | SPN  | Selected Prog Notes  |
| II                                       | Imaging Impression   | DS   | Disabilities         | SW   | Social Work          |
| SII                                      | Sel Image Impression | DD   | Discharge Diagnosis  | SCD  | Spinal Cord Dysfunct |
| IP                                       | Imaging Profile      | DC   | Discharges           | NSR  | NON OR Procedures    |
| IS                                       | Imaging Status       | PRC  | ICD Procedures       | SRO  | Surgery Only Reports |
| BA                                       | Blood Availability   | OPC  | ICD Surgeries        | SR   | Surgery Rpt (OR/NON) |
| BT                                       | Blood Transfusions   | TR   | Transfers            | BSR  | Brief Surgery Rpts   |
| Press RETURN to continue or '^' to exit: |                      |      |                      |      |                      |
| CH                                       | Chem & Hematology    | TS   | Treating Specialty   | SNSR | Selected NON OR Proc |
| SCLU                                     | Lab Cum Selected     | MEDA | Med Abnormal         | URIN | URINALYSIS           |
| SCL1                                     | Lab Cum Selected 1   | MEDB | Med Brief Report     | VS   | Vital Signs          |
| SCL2                                     | Lab Cum Selected 2   | MEDC | Med Full Captioned   | VSD  | Detailed Vitals      |
| SCL3                                     | Lab Cum Selected 3   | MEDF | Med Full Report      | VSO  | Vital Signs Outpat.  |
| SCL4                                     | Lab Cum Selected 4   | MEDS | Med (1 line) Summary | SVS  | Vital Signs Selected |
| CY                                       | Cytopathology        | MHPE | MH Physical Exam     | SVSO | Vital Select Outpat. |

 **Note:** Use the *Information Menu* option (available in all Health Summary menus) to get online lists of the information contained in each health summary component or health summary type.

## 2. Health Summary Types

A health summary *type* is a structure similar to a template, composed of health summary components. The Health Summary package exports four demonstration health summary types (SAMPLE 1, SAMPLE 2, SAMPLE 3, and SAMPLE 4) for use in training and for informational purposes. The package also exports the national type GMTS AD HOC OPTION.

Anyone with the Enhanced Menu or Coordinator's Menu can create customized health summary types for personal use or for use by others.

 **Note:** You can make temporary changes to *selected* components of any health summary type at any time during the display process. Enter a health summary component abbreviation equal to C (e.g., ADR=C) to temporarily change a component's Occurrence Limit, Time Limit, Hospital Location Display, ICD Text Display, Provider Narrative Display, and Selection Items. Any components added to an existing health summary type or any changes to the defined time and occurrence limits do not create a permanent change to the health summary type.

### Demonstration Health Summary Types

SAMPLE 1  
SAMPLE 2  
SAMPLE 3  
SAMPLE 4

### Nationally Exported Health Summary Type

#### GMTS HS ADHOC OPTION

This type is maintained by the sites using Health Summary options:

|                             |                                    |
|-----------------------------|------------------------------------|
| GMTS IRM ADHOC LOAD         | Rebuild Ad Hoc Health Summary Type |
| GMTS IRM ADHOC SUMMARY EDIT | Edit Ad Hoc Health Summary Type    |

### Remote Data View Types

Health Summary Patch 29 (GMTS\*2.7\*29) exports Health Summary Types for using Remote Data Views. Once these are in place and the proper parameters have been set, you can access remote data from other VA facilities.

You can view remote clinical data using any Health Summary Type that has an identically named Health Summary Type installed at both the local and remote sites. However, for non-nationally exported health summary reports, the content of the report is subject to the report structure and configuration defined at the remote site.

### Example scenarios:

## Locally Developed Health Summary Types

Both your site and the remote site have a health summary report called “SURGERY.” As a minimum, that is all that is required to ask for the remote data. Your site has set up the SURGERY health summary report to include the health summary component “Surgery Rpt (OR/NON)” with a time limit of 4 years and an occurrence limit of 10. The remote site has set up the SURGERY health summary report to include the “Surgery Only Reports” component with a time limit of 1 year or 10 occurrences. You will be expecting a report containing both OR Procedures and non-OR Procedures for the last 4 year (or 10 occurrences). You will only receive the OR Procedures for the past year (or 10 occurrences). You will not receive any non-OR Procedures in the remote report. You will get the report as defined at the remote site. If the remote site has assigned the security key SROREP to the health summary report SURGERY, then you will not be able to retrieve any surgical data from the remote site using the “SURGERY” report. This is because you do not own any security keys at the remote site.

## Nationally Exported Health Summary Types (RDV)

It is much different for health summary types exported nationally in support of remote data views. Nationally exported health summary types only contain those health summary components that do not require input other than a date range. Selection items are not allowed for remote data views. For the nationally exported types, not only do the names match exactly from site to site, but the report structure and configuration will also match exactly from site to site. The report format you observe at the local site will be identical to the remote site. The nationally exported health summary types help remove the guesswork and possible frustration of gathering information from other sites.

## Exported Remote Data View Types

Patch 29 (GMTS\*2.7\*29) adds the following Remote Data Views types:

```
REMOTE DEMO/VISITS/PCE (3M)
REMOTE MEDS/LABS/ORDERS (3M)
REMOTE TEXT REPORTS (3M)
REMOTE CLINICAL DATA (3M)
REMOTE CLINICAL DATA (1Y)
REMOTE DEMO/VISITS/PCE (1Y)
REMOTE MEDS/LABS/ORDERS (1Y)
REMOTE TEXT REPORTS (1Y)
REMOTE CLINICAL DATA (4Y)
REMOTE LABS LONG VIEW (12Y)
REMOTE LABS ALL (1Y)
REMOTE LABS ALL (3M)
REMOTE DIS SUM/SURG/PROD (12Y)
REMOTE OUTPATIENT MEDS (6M)
```




## Placing RDV types on the Parameters List

Add the nationally exported Remote Data View Health Summary Types to the Health Summary GUI reports list in a sequence desirable to the site, using the CPRS Manager Menu [ORMGR].

```
Select CPRS Manager Menu Option: PE CPRS Configuration (Clin Coord)
Select CPRS Configuration (Clin Coord) Option: GP GUI Parameters
Select GUI Parameters Option: HS GUI Health Summary Types
Allowable Health Summary Types may be set for the following:

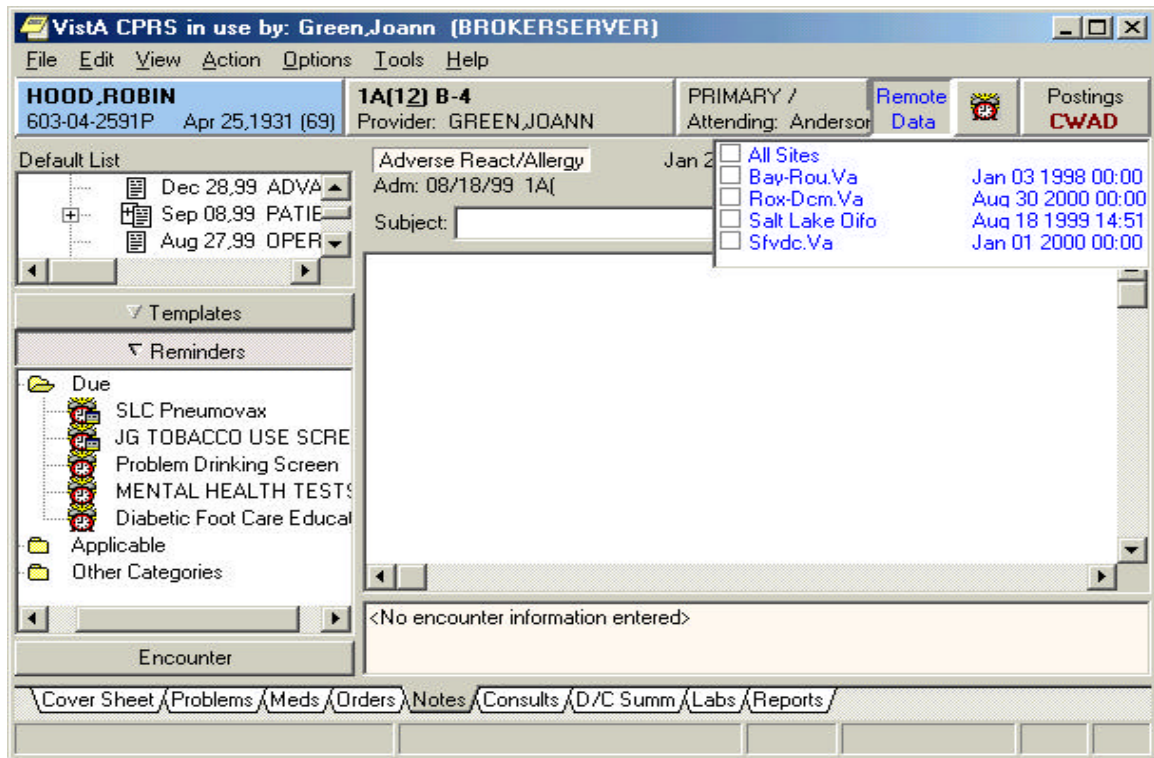
      2   User          USR      [choose from NEW PERSON]
      4   System       SYS      [DEVCUR.ISC-SLC.VA.GOV]
Enter selection: 4

----- Setting Allowable Health Summary Types for System: -----
Select Sequence: 6
Are you adding 6 as a new Sequence? Yes// <Enter>      YES
Sequence: 6// <Enter>      6
Health Summary: REMOTE
Health Summary: REM CM for VA-// REMOTE
      1   REMOTE CLINICAL DATA (1Y)
      2   REMOTE CLINICAL DATA (3M)
      3   REMOTE CLINICAL DATA (4Y)
      4   REMOTE DEMO/VISITS/PCE (1Y)
      5   REMOTE DEMO/VISITS/PCE (3M)
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5:
      6   REMOTE DIS SUM/SURG/PROD (12Y)
      7   REMOTE LABS ALL (1Y)
      8   REMOTE LABS ALL (3M)
      9   REMOTE LABS LONG VIEW (12Y)
     10   REMOTE MEDS/LABS/ORDERS (1Y)
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-10:
     11   REMOTE MEDS/LABS/ORDERS (3M)
     12   REMOTE OUTPATIENT MEDS (6M)
     13   REMOTE TEXT REPORTS (1Y)
     14   REMOTE TEXT REPORTS (3M)
CHOOSE 1-14:1 REMOTE CLINICAL DATA (1Y)
Select Sequence: 7
Are you adding 7 as a new Sequence? Yes// <Enter>      YES
Sequence: 7// <Enter>      7
Health Summary: REMOTE MEDS
      1   REMOTE MEDS/LABS/ORDERS (1Y)
      2   REMOTE MEDS/LABS/ORDERS (3M)
CHOOSE 1-2: 1 REMOTE MEDS/LABS/ORDERS (1Y)
Etc.
```

 **Warning:** If you set up *user* parameters (#2 above), the user parameters will overwrite all settings previously set in the system settings, and the user will not see the remote data views set in the system settings.

## How Do I Know a Patient Has Remote Medical Data?

As part of opening a patient record, CPRS checks in the Treating Specialty file to see if the selected patient has been seen in other VA facilities. If the patient has remote data, the words on the Remote Data button turn blue as shown in the image below. If there is no remote data for the selected patient, the letters are gray. When you click on the Remote Data button, you see a list of treatment facilities and the last date the selected patient was seen at those facilities.



*For more information about setting up and using Remote Data Views, see CPRS documentation.*

### 3. Build Health Summary Type Menu

Use the options in the Build Health Summary Type menu (on the Health Summary Coordinator's Menu) to create health summary types consisting of the components you designate or have been asked to create by a health summary user.  
*Remember:* It is the health summary *type* that determines what information is included on a health summary.

The Build Health Summary Type menu contains four options:

- 1 Create/Modify Health Summary Type
- 2 Delete Health Summary Type
- 3 Information Menu ...
- 4 Print Health Summary Menu ...

Options 1 and 2 are used to create, modify, and delete health summary *types*.

Option 3 consists of six information options that provide detailed information on health summary types and components.

Option 4 is included for your convenience so you don't have to leave the menu to get patient health summary information.

Options 1 and 2 are explained in detail on the following pages.

#### Create/Modify Health Summary Type

Use this option to:

- Create a new health summary type by *copying* all or a few components from an existing health summary type.
- Create a new health summary type from *scratch*, by selecting components one at a time and defining the occurrences, time limits, and selection items.
- Modify an existing health summary type.

### **Create Health Summary Type Example**

Two examples follow. In the first example, a health summary type is created by copying components from an existing health summary type. In the second example, a new health summary type is built from scratch.

**Example 1** — *Creating a health summary type by copying from an existing summary (assuming you have the GMTSMGR key):*

1. Select Create/Modify Health Summary Type from the Build Health Summary Type Menu on the Health Summary Coordinator's Menu.

```
Select Build Health Summary Menu Option: Create/Modify Health Summary Type
```

2. Select a new name for a Health Summary Type.

```
Select Health Summary Type: ICU ZZTEST  
ARE YOU ADDING 'ICU ZZTEST' AS A NEW HEALTH SUMMARY TYPE? Y (Yes)  
NAME: ICU ZZTEST// <RET>
```

ICU ZZTEST is the NAME of the Health Summary Type. This name will appear in the health summary header. The word “CONFIDENTIAL” will appear in front of this name and the word “SUMMARY” will appear at the end to complete the header.

Name entered: ICU ZZTEST

Generated Health Summary header: CONFIDENTIAL ICU ZZTEST SUMMARY.

3. Enter a title if you wish to replace NAME with the title in the health summary header. For example, if you enter the Name as ICU, and the Title as INTENSIVE CARE UNIT, the header that will be shown will be CONFIDENTIAL INTENSIVE CARE UNIT SUMMARY.

```
TITLE: INTENSIVE CARE
```

4. Enter yes or no to about whether to suppress components headings when those components don't contain data. For health summary types that are displayed on the screen, this component will still be displayed with a "No data available" message. This is done to eliminate confusion that may occur when jumping between components.

```
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: Y  YES
```

5. Enter Lock and Owner, if appropriate. Enter a LOCK if you wish to restrict edit/delete access to your health summary type. You must hold the GMTSMGR security key to enter a lock. You are automatically considered the owner, unless you hold the GMTSMGR key. If you hold the GMTSMGR key you have to designate yourself or someone else as the owner.

```
LOCK: <RET>
```

```
OWNER: <RET>
```

6. If you want to copy components from an existing Health Summary Type, accept the default at that question and then enter the name of the Type to copy from. The components for that Type are then listed.

```
Do you wish to copy COMPONENTS from an existing Health Summary Type?  
YES// <RET>
```

```
Select Health Summary Type to copy from:  SAMPLE 1
```

```
The Following Components are Available:
```

|      |                    |      |                  |
|------|--------------------|------|------------------|
| BDEM | Brief Demographics | RS   | Radiology Status |
| BLO  | Brief Lab Orders   | SCLU | Lab Cum Selected |
| BMIC | Brief Microbiology | DC   | Discharges       |
| BSR  | Brief Surgery Rpts |      |                  |

7. Select the components you want to include in your new type. You can only select components to copy from the SAMPLE 1 health summary type. If you need to add a component NOT in the SAMPLE 1 health summary type, you can do so at the second Select COMPONENT: prompt, shown below. You can enter "ALL" at this prompt to select all the components in the Brief Clinical health summary type.

```
Select COMPONENT(S): vs,blo,dc,sclu
```

```
VS is not a valid selection.
```

```
For entry "VS" re-enter: <RET>
```

8. You will then see a list of the parameters you have chosen, followed by a list of the components and their selection items.

|  |       |                  |            |      |             |             |              |           |
|--|-------|------------------|------------|------|-------------|-------------|--------------|-----------|
| Type Name: ICU ZZTEST                      |       |                  |            |      |             |             |              |           |
| Title:                                     |       |                  |            |      |             |             |              |           |
| Owner: USER, COORDINATOR                   |       |                  |            |      |             |             |              |           |
| SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: |       |                  |            |      |             |             |              |           |
| Abb.                                       | Order | Component Name   | Max<br>Occ | Time | Hosp<br>Loc | ICD<br>Text | Prov<br>Narr | Selection |
| -----                                      |       |                  |            |      |             |             |              |           |
| BLO  | 5     | Brief Lab Orders | 10         | 1Y   |             |             |              |           |
| DC   | 10    | Discharges       | 10         |      |             |             |              |           |
| SCLU                                       | 15    | Lab Cum Selected | 10         | 1Y   |             |             |              |           |
| SODIUM                                     |       |                  |            |      |             |             |              |           |
| POTASSIUM                                  |       |                  |            |      |             |             |              |           |
| CHLORIDE                                   |       |                  |            |      |             |             |              |           |
| CALCIUM                                    |       |                  |            |      |             |             |              |           |
| AMYLASE                                    |       |                  |            |      |             |             |              |           |
| CREATININE                                 |       |                  |            |      |             |             |              |           |
| NITRO                                      |       |                  |            |      |             |             |              |           |
| GLUCOSE                                    |       |                  |            |      |             |             |              |           |
| UREA                                       |       |                  |            |      |             |             |              |           |

9. You can now enter components not in the SAMPLE 1 Health Summary Type. You will also be prompted to enter SUMMARY ORDER, OCCURRENCE LIMIT, TIME LIMIT, and HEADER NAME, and then asked if you wish to review the Summary Type structure.

```
Select COMPONENT: VS    VITAL SIGNS VS  ← Re-enter the "VS" component
here.
SUMMARY ORDER:  20
OCCURRENCE LIMIT: 5
TIME LIMIT: 1Y
HEADER NAME:  Vital Signs// <RET>
Select COMPONENT:  <RET>

Do you wish to review the Summary Type structure before continuing? NO//
Y YES
```

```

Type Name: ICU ZZTEST
Title:
Owner: USER,COORDINATOR
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:

```

| Abb.   | Order | Component Name   | Max<br>Occ | Time | Hosp<br>Loc | ICD<br>Text | Prov<br>Narr | Selection |
|--|-------|------------------|------------|------|-------------|-------------|--------------|-----------|
| BLO  | 5     | Brief Lab Orders | 10         | 1Y   |             |             |              |           |
| DC   | 10    | Discharges       | 10         |      |             |             |              |           |
| SCLU   | 15    | Lab Cum Selected | 10         | 1Y   |             |             |              |           |
| SODIUM   |       |                  |            |      |             |             |              |           |
| POTASSIUM  |       |                  |            |      |             |             |              |           |
| CHLORIDE   |       |                  |            |      |             |             |              |           |
| CALCIUM  |       |                  |            |      |             |             |              |           |
| AMYLASE  |       |                  |            |      |             |             |              |           |
| CREATININE   |       |                  |            |      |             |             |              |           |
| NITRO  |       |                  |            |      |             |             |              |           |
| GLUCOSE  |       |                  |            |      |             |             |              |           |
| VS   | 20    | Vital Signs      | 5          | 1Y   |             |             |              |           |
| Select COMPONENT: <RET>  |       |                  |            |      |             |             |              |           |
| Do you wish to review the Summary Type structure before continuing? NO// |       |                  |            |      |             |             |              |           |
| <RET>  |       |                  |            |      |             |             |              |           |
| Please hold on while I resequence the summary order....                  |       |                  |            |      |             |             |              |           |
| Select Health Summary Type: <RET>  |       |                  |            |      |             |             |              |           |

**Example 2 — Creating a Health Summary Type from scratch:**

```

Select Health Summary Type: CCU ZZTEST
ARE YOU ADDING 'CCU ZZTEST' AS A NEW HEALTH SUMMARY TYPE? Y (YES)
NAME: CCU ZZTEST// <RET>
TITLE: <RET>
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: <RET>
LOCK: <RET>
OWNER: <RET>

Do you wish to copy COMPONENTS from an existing Health Summary Type?
YES// NO

Select COMPONENT: DEM MAS DEMOGRAPHICS DEM
SUMMARY ORDER: 5// <RET> ← This is the component order default
assigned by the program.
HEADER NAME: Demographics// <RET>
Select COMPONENT: LO LAB ORDERS LO
SUMMARY ORDER: 10// <RET>
OCCURRENCE LIMIT: 20
TIME LIMIT: 1Y
HEADER NAME: Lab Orders// <RET>

```

```
Select COMPONENT: <RET>
Continue building the health summary type with more components until it is
completed.

Do you wish to review the Summary Type structure before continuing? NO//
<RET>
Please hold on while I resequence the summary order..

Select Health Summary Type: <RET>
```

### ***Modify (Edit) Health Summary Type Example***

Health summary types can be edited or deleted only by the owner, by holders of the GMTSMGR key, or holders of a lock associated with the type to be edited. Alteration of any health summary type is restricted to its owner.

#### ***Example 1 — Editing the Summary Component Order:***

```
Select Health Summary Coordinator Menu Option: Create/Modify Health Summary
Type
Select Health Summary Type: ICU ZZTEST
NAME: ICU ZZTEST// <RET>
TITLE: ICU PATIENT INFO
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: <RET>
LOCK: <RET>
OWNER: <RET>
Do you wish to review the Summary Type structure before continuing? NO// Y
YES

                                HEALTH SUMMARY TYPE INQUIRY

                                Type Name: ICU ZZTEST
                                Title:
                                Owner: USER,COORDINATOR
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:
                                Max      Hosp ICD   Prov
Abb.  Order  Component Name      Occ  Time  Loc   Text  Narr  Selection
-----
BLO      5    Brief Lab Orders      10   1Y
DC       10    Discharges                10
SCLU    15    Lab Cum Selected          10   1Y

                                SODIUM
                                POTASSIUM
                                CHLORIDE
                                CALCIUM
                                AMYLASE
                                CREATININE
                                UREA NITRO
                                GLUCOSE

VS       20    Vital Signs          5    1Y

Select COMPONENT: VS    VITAL SIGNS  VS
VITAL SIGNS is already a component of this summary.

    Select one of the following:
        E      Edit component parameters
        D      Delete component from summary
```



```

Select Action: Edit
SUMMARY ORDER: 20// 15

LAB CUMULATIVE SELECTED Already exists at SUMMARY ORDER 15

    Select one of the following:

        O          Overwrite
        I          Insert Before
        A          Append After

Select Action: Insert Before
Inserted as SUMMARY ORDER: 12 VITAL SIGNS  ← "12 VITAL SIGNS" was entered
                                           by the program.

HEADER NAME: Vital Signs// <RET>
OCCURRENCE LIMIT: <RET>
TIME LIMIT: <RET>
Select COMPONENT: <RET>

Do you wish to review the Summary Type structure before continuing? NO// N
NO
Please hold on while I resequence the summary order.....  ←The package
automatically resequences the summary order in multiples of five.

Select Health Summary Type: <RET>

```

**Example 2 — Editing the Maximum Occurrences, Time Limit, Header Name, and Selection Items:**

```

Select Health Summary Enhanced Menu Option: Create/Modify Health Summary Type
Select Health Summary Type: ICU ZZTEST_
NAME: ICU ZZTEST// <RET>
TITLE: ICU PATIENT INFO// <RET>
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: <RET>
LOCK: <RET>
OWNER: <RET>

Do you wish to review the Summary Type structure before continuing? NO//
<RET>.

Select COMPONENT: SCLU LAB CUMULATIVE SELECTED SCLU
LAB CUMULATIVE SELECTED is already a component of this summary.

    Select one of the following:

        E          Edit component parameters
        D          Delete component from summary

Select Action: EDIT
SUMMARY ORDER: 20// <RET>
OCCURRENCE LIMIT: 10// 5_
TIME LIMIT: 1Y// 6M
HEADER NAME: Lab Cum Selected// <RET>  ←Or enter a new name for the component.
Current selection items are: SODIUM
                           POTASSIUM
                           CHLORIDE

```

```

                                CALCIUM
                                AMYLASE
                                CREATININE
                                UREA NITROGEN
                                GLUCOSE
Select new items one at a time in the sequence you want them displayed.
You may select any number of items.

Select SELECTION ITEM:  GLUCOSE  ← You may add or delete selection
                                items at this prompt. To delete "Calculated
                                Osmolality" enter the at-sign @ at this
                                prompt. To add any valid Lab test, enter the
                                test name at this prompt.

Select SELECTION ITEM:  <RET>

Select COMPONENT: <RET>  ← You may enter another component name for editing.

```

**Example 3: Deleting a health summary component from a health summary type.**

```

Select Health Summary Coordinator Menu Option: Create/Modify Health Summary
Type

Select Health Summary Type:  ICU ZZTEST_
NAME: ICU ZZTEST// <RET>
TITLE: ICU PATIENT INFO// <RET>
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: <RET>
LOCK: <RET>
OWNER: <RET>

Do you wish to review the Summary Type structure before continuing?NO//<RET>
Or you could answer YES to refresh your memory on the components to edit.

Select COMPONENT: VS      VITAL SIGNS      VS
VITAL SIGNS is already a component of this summary.

      Select one of the following:
      E      Edit component parameters
      D      Delete component from summary

Select Action: DELETE  ← Before pressing the return key you should be sure
                                you want to delete this component. After you identify
                                a component, it will be deleted with NO second chance
                                when you press the return key.

Deleting Summary Order 15 VITAL SIGNS

Select COMPONENT:  <RET>

Do you wish to review the Summary Type structure before continuing? NO// <RET>
Please hold on while I resequence the summary order.....

```

## Delete Health Summary Type

This option lets you delete a health summary type.

 **Note:** You must have the GMTSMGR key to delete health summary types.

```
Select Health Summary Enhanced Menu Option: Delete Health Summary Type

Select Health Summary Type: ICU ZZTEST_
Are you sure you want to delete the ICU ZZTEST Health Summary type? NO// Y YES

Health Summary Type ICU ZZTEST Deleted!

Select Health Summary Type: <RET> ←You may enter another summary type for
deletion. Pressing return takes you back to
the Health Summary Coordinator's menu.
```

## 4. User Preferences

### CPRS Reports Tab 'Health Summary Types List' Menu

Use the options in the CPRS Reports Tab 'Health Summary Types List' Menu to select the Health Summary Types to list on the Reports Tab, arrange the order of these Health Summaries on the list, and to the user's preferences.

The CPRS Reports Tab 'Health Summary Types List' Menu contains four options:

- 1 Display 'Health Summary Types List' Defaults
- 2 Precedence of 'Health Summary Types List'
- 3 Method of compiling 'Health Summary Types List'
- 4 Edit 'Health Summary Types List' Parameters

#### Display 'Health Summary Types List' Defaults

Use this option to display the list of Health Summary Types that will be contained in the 'Health Summary Types' box on the Reports Tab in CPRS.

The display includes the precedence of parameters, the method for building the list, and finally the list that will appear on the Reports Tab in CPRS.

**Precedence of Parameters** - Health Summary Types can be established for the system and for the users. Additionally, there are Nationally exported Health Summary Types. This precedence indicates the order in which these types will be displayed (i.e., display user defined types before system defined types).

**Method** - The list can be built either by overwriting the list with each higher precedence of Health Summary Types or by appending each level of precedence to the list (prior to this option, the only choice was overwriting the list).

**List** - A list of Health Summary Types that will appear in the 'Health Summary Types' box on the Reports Tab will be listed.

NOTE: If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to display the 'Health Summary Types List' defaults.

*Without the GMTSMGR Key:*

|  |                               |                             |
|--|-------------------------------|-----------------------------|
| Health Summary Types list for CPRS Reports Tab                             |                               | JUL 17, 2001                |
| -----  |                               |                             |
| Precedence of Parameters:  |                               | USR;SYS;NAT                 |
| 1  | User preferences              |                             |
| 2  | System defined                |                             |
| 3  | National Health Summary Types |                             |
| Method for building the List:  |                               | Append                      |
| Add User Defined Summary Types to the list, then                           |                               |                             |
| Append with System Defined Summary Types (if found), then                  |                               |                             |
| Add National Defined Summary Types (if found)                              |                               |                             |
| The Health Summary Types box will list the following Health Summary Types: |                               |                             |
| User defined types   | 1                             | GMTS HS ADHOC OPTION        |
|  | 2                             | SURGERY                     |
|  | 3                             | RADIOLOGY                   |
| System defined types   | 4                             | DIABETES (1)                |
|  | 5                             | AC CLINICAL SUMMARY         |
|  | 6                             | PAIN MANAGEMENT             |
| National types   | 7                             | REMOTE CLINICAL DATA (1Y)   |
|  | 8                             | REMOTE CLINICAL DATA (3M)   |
|  | 9                             | REMOTE CLINICAL DATA (4Y)   |
|  | 10                            | REMOTE DEMO/VISITS/PCE (1Y) |
|  | 11                            | REMOTE DEMO/VISITS/PCE (3M) |
|  | 12                            | REMOTE LABS ALL (1Y)        |
|  | 13                            | REMOTE LABS ALL (3M)        |
|  | 14                            | REMOTE LABS LONG VIEW (12Y) |

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user preference.

## Precedence of 'Health Summary Types List'

Use this option to select the defined Health Summary Types to include on the list and arrange them in the order (precedence) that they should appear on the list.

Currently there are three groups of Health Summary Types that may be predefined and made available on the Reports Tab of CPRS.

**SYS** Health Summary Types may be defined for all users on the system.

**USR** Health Summary Types may be defined for a single user on the system.

**NAT** Nationally exported Health Summary Types (NAT) defined for system users or a single user are treated independently to keep them together in the list box.

In this option, you must first select those Health Summary Type groups (SYS, USR, or NAT) to include on the Reports Tab, then specify the order in which they will appear on the Reports Tab.

**NOTE:** If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to edit the precedence.

*Without the GMTSMGR Key:*

```
GUI Reports Tab, Health Summary Type List (Contents)

Include User Preferred Health Summary Types: (Y/N) Y// <RET>ES
System Defined Health Summary Types: (Y/N) Y// <RET>ES
National Types (Remote Data Views): (Y/N) Y// <RET>ES

You have selected multiple Health Summary types to be listed on the CPRS
reports tab, in the Health Summary Types box. Now you must select the
order in which you want these to be displayed.

Order to Display Included Health Summary Types

    1 User Preferred Health Summary Types
    2 System Level Health Summary Types
    3 Nationally Exported Health Summary Types

Select the 1st to be listed: 1// <RET>

    1 System Level Health Summary Types
    2 Nationally Exported Health Summary Types

Select the 2nd to be listed: 1// <RET>
```

```
You have selected three Health Summary Types, arranged
in the following order:
```

- 1 User Preferred Health Summary Types
- 2 System Level Health Summary Types
- 3 Nationally Exported Health Summary Types

```
Is this correct? (Y/N) Y// Y
```

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user preference.

**Method of compiling ‘Health Summary Types List’**

Use this option to see how the list of Health Summary Types is to be built.

**Overwrite** - System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will replace the System defined Health Summary Types already on the list.

**Append** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will added to the list along with the System-defined types.

NOTE: If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to edit the method.

*Without the GMTSMGR Key:*

```
CPRS Reports Tab, Health Summary Type List (Order)
```

```
Append selected Health Summary Types to the list
Overwrite selected Health Summary Types to the list
```

```
Select Append/Overwrite (A/O): A// <Enter>ppend
```

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user method.

### **Edit 'Health Summary Types List' Parameters**

Use this option to add, edit or delete a Health Summary Type from the list of Health Summary Types defined by the user. If you are a holder of the GMTSMGR Key, you can also use this option to edit the Health Summary Types defined for the System. Also, if you are the holder of the GMTSMGR key, you will be prompted for the name of the user to edit their list of preferred Health Summary Types.

*Without the GMTSMGR Key:*

Adding the Health Summary Type 'REMOTE CLINICAL DATA (1Y)' to the list of preferred Health Summary Types to be displayed for the user on the CPRS Reports Tab:

```
Edit the CPRS Health Summary Types list on the reports tab

----- Setting GUI Health Summary Type List for User: USER,LOCAL -----
Select Sequence: 15
Are you adding 15 as a new Sequence? Yes//<Enter> YES

Sequence: 15// <Enter> 15
Health Summary: REMOTE CLIN
  1  REMOTE CLINICAL DATA (1Y)
  2  REMOTE CLINICAL DATA (3M)
  3  REMOTE CLINICAL DATA (4Y)
CHOOSE 1-3: 1  REMOTE CLINICAL DATA (1Y)
Select Sequence: <Enter>
```

*With the GMTSMGR Key:*

Adding the Health Summary Type 'REMOTE CLINICAL DATA (1Y)' to the list of preferred Health Summary Types to be displayed for all users on the **system** on the CPRS Reports Tab:

```
Allowable Health Summary Types may be set for the following:

  2  User          USR      [choose from NEW PERSON]
  4  System        SYS      [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 4  System  DEVCUR.ISC-SLC.VA.GOV
```



```
- Setting Allowable Health Summary Types for System: DEVCUR.ISC-SLC.VA.GOV -  
Select Sequence: 8  
Are you adding 8 as a new Sequence? Yes// <Enter> YES  
  
Sequence: 8// <Enter> 8  
Health Summary: REMOTE CLIN  
    1  REMOTE CLINICAL DATA (1Y)  
    2  REMOTE CLINICAL DATA (3M)  
    3  REMOTE CLINICAL DATA (4Y)  
CHOOSE 1-3: 1  REMOTE CLINICAL DATA (1Y)  
Select Sequence:
```

## 5. Site Preferences

### CPRS Health Summary Display/Edit Site Defaults Menu

Use the options in the CPRS Health Summary Display/Edit Site Defaults Menu to display the site defaults, select the Health Summary Types to list on the Reports Tab, edit the method of building the list (append/overwrite), edit allowable entities for the list (i.e., User, System, Division, etc.), or resequence the allowable entities in the order they should be appear on the list.

The CPRS Health Summary Display/Edit Site Defaults Menu contains five options:

- 1 Display Site Health Summary List Defaults
- 2 Edit 'Health Summary Type List' Parameters
- 3 Edit Default HS Type List Compile Method
- 4 Add/Edit Allowable Entities for HS List
- 5 Resequence Allowable Entities for HS List

### Display Site Health Summary List Defaults

Use this option to display the site defaults for building the list of Health Summary Types on the Reports Tab in CPRS. The display includes the method for building the list and the precedence of parameters. These default values will be used in the event that the user has not established user preferences. This option is similar to the option GMTS GUI HS LIST DEFAULTS (Display 'Health Summary Types List' Defaults), which allows the user to display user preferences.

**Method** - The list can be built either by overwriting the list with each higher precedence of Health Summary Types or by appending each level of precedence to the list (prior to this option, the only choice was overwriting the list).

**Precedence of Parameters** - Health Summary Types can be established for the system and for the users. Additionally, there are Nationally exported Health Summary Types. This precedence indicates the order in which these types will be displayed (i.e., display user defined types before system defined types).

```

Display default Health Summary Type list for SALT LAKE CITY OIFO

DEVICE: HOME// ;;9999 ANYWHERE

SALT LAKE CITY OIFO Defaults for CPRS Reports Tab          JAN 14, 2002

-----
Precedence of Parameters:          DIV;USR;CLS;SYS

1  Division defined
2  User preferences
3  Class defined
4  System defined

Method for building the List:      Append

Add Division Defined Summary Types to the list, then
Append with User Defined Summary Types (if found), then
Append with Class Defined Summary Types (if found), then
Append with System Defined Summary Types (if found)

```

## Edit 'Health Summary Types List' Parameters

Use this option to add, edit or delete a Health Summary Type from the list of Health Summary Types defined for a given entity (System, Division, User, etc.). This option is similar to the option GMTS GUI HS LIST PARAMETERS (Edit 'Health Summary Types List' Parameters), which allows the user to add/edit Health Summary Types for the 'User' entity.

```

Select CPRS Health Summary Display/Edit Site Defaults Option:
Edit 'Health Summary Types List' Parameters

Allowable Health Summary Types may be set for the following:

2  Division      DIV      [choose from INSTITUTION]
3  User          USR      [choose from NEW PERSON]
8  Class         CLS      [choose from USR CLASS]
9  System        SYS      [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 2  Division      INSTITUTION
Select INSTITUTION NAME:      SALT LAKE CITY OIFO  UT  ISC

- Setting Allowable Health Summary Types for Division: SALT LAKE CITY
OIFO

Select Sequence: 9

Are you adding 9 as a new Sequence? Yes// y  YES

Sequence: 9//<Enter>      9

Health Summary: rad

1  RAD

```

```

2  RAD NAN
3  RADIOLOGY
4  RADIOLOGY ONLY
5  RADIOLOGY PROFILE

Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5: 3  RADIOLOGY

Select Sequence: ?

      Sequence                Value
      -----                -
      1                      GMTS HS ADHOC OPTION
      2                      DEMOGRAPHICS
      3                      SURGERY
      9                      RADIOLOGY

```

### Edit Default HS Type List Compile Method

Use this option to see how the list of Health Summary Types is to be built. This method will be used for all users who do not have user preferences set. This option is similar to the option GMTS GUI HS LIST METHOD (Method of compiling 'Health Summary Types List'), which allows the user to define their Health Summary List compile method preference.

**Overwrite** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will replace the System defined Health Summary Types already on the list.

**Append** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will added to the list along with the System defined types.

```

Site Default Method for building 'Health Summary Types'
List on the CPRS Reports Tab

Append selected Health Summary Types to the list
Overwrite selected Health Summary Types to the list

Select Append/Overwrite (A/O): A//<Enter> Append

```

## Add/Edit Allowable Entities for HS List

Use this option to add or delete an entity (System, Division, User, etc) from the list of allowable entites for the parameter 'ORWRP HEALTH SUMMARY TYPE LIST' used on the CPRS Reports Tab to display the Health Summary Types List.

```
ORWRP HEALTH SUMMARY TYPE LIST' ALLOWABLE ENTITIES

elect ALLOWABLE ENTITIES PRECEDENCE: ?

    Answer with ALLOWABLE ENTITIES PRECEDENCE

Choose from:
2          INSTITUTION
3          NEW PERSON
8          USR CLASS

You may enter a new ALLOWABLE ENTITIES, if you wish
Type a Number between 0 and 999.99, 2 Decimal Digits

elect ALLOWABLE ENTITIES PRECEDENCE: 9

Are you adding '9' as a new ALLOWABLE ENTITIES (the 4TH for
this PARAMETER DEFINITION)? No//  y  (Yes)

elect PARAMETER ENTITY NAME: ?
Answer with PARAMETER ENTITY FILE NUMBER, or NAME, or PREFIX
Do you want the entire PARAMETER ENTITY List? y  (Yes)
Choose from:
4          DIVISION
4.2        SYSTEM
49         SERVICE
100.21     TEAM (OE/RR)
200        USER
8930       CLASS

Select PARAMETER ENTITY NAME: system
```

## Resequence Allowable Entities for HS List

Use this option to resequence the order in which the allowable entites for parameter 'ORWRP HEALTH SUMMARY TYPE LIST' are used in building the list of Health Summary Types for the CPRS Reports Tab. This order is used for any user who does not have user preferences set.

```
Parameter "ORWRP HEALTH SUMMARY TYPE LIST" has 4 allowable entities
which may have the Health Summary Types on the CPRS reports tab
and are used in the following order:

1  System level defined Health Summary Types
2  User defined Health Summary Types
3  Division level defined Health Summary Types
4  Class defined Health Summary Types
```

Are these in the correct order for your site? Y// **NO**

Please select the order in which you want these to be entities to be used.

- 1 System level defined Health Summary Types
- 2 User defined Health Summary Types
- 3 Division level defined Health Summary Types
- 4 Class defined Health Summary Types

Select the 1st entity to be used: 1// **3**

- 1 System level defined Health Summary Types
- 2 User defined Health Summary Types
- 3 Class defined Health Summary Types

Select the 2nd entity to be used: 1// **1**

- 1 User defined Health Summary Types
  - 2 Class defined Health Summary Types
- Select the 3rd entity to be used: 1// **2**

You have selected to resequenced the Health Summary Type entities in the following order:

| FROM (Current) | TO (Resequenced) |
|----------------|------------------|
| -----          | -----            |
| 1 System       | Division         |
| 2 User         | System           |
| 3 Division     | Class            |
| 4 Class        | User             |

Is this OK? Y// **<Enter> YES**

# **Chapter 4:**

## **Managing Health Summary**

- 1. Health Summary Coordinator's Menu**
- 2. Security, Locks, and Keys**
- 3. Batch Printing Options**
- 4. CPRS Reports Tab 'Health Summary Types List' Menu**





# Managing Health Summary

---

Chapter 4 provides information to help Health Summary Coordinators manage the package. It includes a description and examples of how to use the batch printing process. The *Health Summary Installation Guide* and *Health Summary Technical Manual* contain more detailed information about setting up the package and IRM/ADPAC Maintenance options .

## 1. Health Summary Coordinator's Menu

This menu is for Clinical Coordinators who use the special Health Summary package features for batch printing nightly summaries and building customized health summary types. It also provides all the user functions of the other two user menus described in the previous sections.

Only the batch printing options are described in this chapter.

- 1 Print Health Summary Menu ...
- 2 Build Health Summary Type Menu ...
- 3 Set-up Batch Print Locations
- 4 List Batch Health Summary Locations
- 5 CPRS Reports Tab 'Health Summary Types List' Menu ...

## 2. Security, Locks, and Keys

A health summary type may be used by several different people and should not be changed indiscriminately. Therefore, editing health summary types has been restricted in several ways. *First*, a user must have access to the Health Summary Coordinator's or Enhanced menus to edit or create a health summary type. *Second*, edit access to a particular health summary is restricted unless the user is the owner of that health summary type or holds certain security keys (e.g., GMTSMGR).

### *Owner*

The owner of a health summary type is designated when a health summary type is created and has edit access to that health summary type. Usually the creator of a health summary type is automatically designated as its owner. However, if the creator of the health summary type holds the GMTSMGR key, the creator may designate another person as the owner. If you are assigned the GMTSMGR key, you are *not* automatically designated as the owner. You must still enter your name as "owner."

### *Lock*

A lock may also be designated when a health summary type is created. The lock gives edit access for that health summary type to anyone who holds the matching security key. For example, someone creating a Pathology Health Summary Type may want to enter LRSUPER as the lock, thereby giving edit access to any holder of the LRSUPER security key. The four health summary types included with the Health Summary package—SAMPLE 1, SAMPLE 2, SAMPLE 3, and GMTS HS ADHOC OPTION—have the GMTSMGR lock.

### *Keys*

#### *GMTS VIEW ONLY*

The GMTS VIEW ONLY security key allows you to view a health summary only on your terminal screen. You cannot print a paper copy of the health summary.

#### *GMTSMGR*

The GMTSMGR security key allows you to edit health summary types which are locked with the GMTSMGR key. It also provides master edit access to all other health summary types. This key should be issued with caution by the IRM Service or Clinical Coordinator.

### 3. Batch Printing Process

The Health Summary package allows coordinators to schedule nightly batch processing of health summaries for patients in a particular ward, patients in outpatient clinics, or patients scheduled for operating room surgeries the following day or up to ten days ahead. The advantages of Batch processing are 1) it enables the clinic to have the most current clinical information available when the patient arrives for the appointment, and 2) processing can take place in non-peak computer hours.

The nightly batch job recognizes non-workdays (weekends and holidays). Data will not be printed out on non-workdays. For example, if you want a Health Summary type printed out for Monday clinics one day in advance, it will now print on the previous Friday rather than on Sunday.

#### Batch Print of All Clinics by Visit Date

This option allows Coordinators to interactively designate the batch print of all health summaries for patients with appointments at all outpatient clinics on a selected day. Summaries can be printed at the print device designated for the clinic in the Location Parameters. This option is an alternate method for designating when summaries should be printed for all clinics, rather than using the batch print option available for queuing nightly batch print jobs. The option used for printing nightly batch job summaries for wards, clinics, or operating room locations should be disabled if the user wishes to use this option on a daily basis.

#### *Steps to use Batch Print:*

1. Select the Batch Print of All Clinics by Visit Date option from your menu.

```
Select Print Health Summary Menu Option: 6  Batch Print of All Clinics
by Visit Date
```

```
This option will queue Health Summaries for a specified Visit Date
for all Outpatient Clinics with Appointments on that Visit Date.
```

2. Select the Visit date.

```
Please enter the Visit date: 12/19/94//<RET> (DEC 19, 1994)
```

```
Date and Time to Queue this Job to run: NOW// <RET>
```

## Set-up Batch Print Locations

This option allows you to set, edit, or delete parameters that will be used to print batches of health summaries of a specific type, in a particular hospital location. Only one set of parameters exists for a particular location and patient.

*Steps to use Set-up Batch Print Location:*

1. Select the Set-up option from the Health Summary Coordinator's Menu.

```
Select Health Summary Coordinator's Menu Option: 3 Set-up Batch Print Location
```

If you select the Set-up Batch Print Locations option and receive the message in the first box shown below, contact your IRM office and ask them to turn on the GMTS TASK STARTUP option.

```
** Alert **
Health Summary batches have not been queued to print. Please ask your
site manager to queue the option GMTS TASK STARTUP to run nightly.
Parameters may be set now but will not produce health summaries until
option is queued.
```

2. Type in a hospital location name (for example, eye clinic, C Ward, NHCU, etc.).

```
Select HOSPITAL LOCATION NAME: C WARD
```

If parameters are set for the location you chose, the following message appears:

```
At present the following Health Summary Types are printed for C WARD:

  Type           Device      Days Ahead      Action Profile
  Dr. Smith      WORK        1               Yes
  *OUTPATIENT    2               No

*This Type will not print since Device has not been set

You may edit a Health Summary Type from the list or enter a new Type

Select HEALTH SUMMARY TYPE NAME: SAMPLE 1

Do you wish to review the Summary Type structure before continuing?
NO// <RET>
```

3. Enter the name of the printer you want the summary printed at. If you enter a ?, you will see the message shown:

```

DEVICE FOR NIGHTLY PRINT: ?
      Please specify the printer nearest LOCATION
      ANSWER WITH DEVICE NAME, OR LOCAL SYNONYM, OR $I, OR VOLUME SET
      (CPU), OR SIGN-ON SYSTEM DEVICE.
      DO YOU WANT THE ENTIRE DEVICE LIST? No
DEVICE FOR NIGHTLY PRINT: WORK


```

4. If you want an action profile to print with the Health Summary, answer yes.

```

PRINT ACTION PROFILE: NO// <RET>
PRINT DAYS AHEAD: 2// <RET>

```

 **Note:** “PRINT DAYS AHEAD:” is only prompted for if the location you selected is a clinic or operating room.

### *Delete Batch Printing Set Up*

To discontinue a batch printing set-up of health summaries at a location, delete the health summary type using the same option you used to set up batch printing.

### *Steps to Delete Batch Printing Set-up :*

1. Select Set-up Batch Print Locations from the Health Summary Coordinator's Menu.

```

Select Health Summary Coordinator's Menu Option: 3 Set-up Batch Print
Location

```

2. Enter the hospital location and the Health Summary Type you want to delete the batch printing for.

```

Select Hospital Location: ONCOLOGY

At present the following Health Summary Types are printed for
ONCOLOGY:

      Type                Device        Days Ahead        Action
                                Profile
SAMPLE 1                WORK                2                No

You may edit a Health Summary Type from the list or enter a new Type
Select Health Summary Type: SAMPLE 1

```

```

Do you wish to review the Summary Type structure before continuing?
NO// <RET>

Do you wish to delete this Health Summary Type from the nightly print?
NO// Y YES

**Print for Health Summary Type deleted**

Select Hospital Location: <RET>

```

### *List Batch Health Summary Locations*

This option lets you view the hospital locations requesting nightly batch printing of health summaries. The listing shows the hospital location, the device designated for printing, the number of days in the future the print will occur, whether an Outpatient Pharmacy Action Profile will be appended, and the health summary type.

#### *Steps to use option:*

1. Select List Batch Health Summary Locations from the Health Summary Coordinator's Menu.

```

Select Health Summary Coordinators Menu Option: List Batch Health
Summary Locations

```

2. Type the name of the printer or press return if you want the list displayed online.

```

DEVICE: HOME//<RET>

```

3. The list of locations is printed on your screen.

| Batch Health Summary Locations List |              |                        | OCT 17, 1990               | PAGE 1         |
|-------------------------------------|--------------|------------------------|----------------------------|----------------|
| Location                            | Device       | Print<br>Days<br>Ahead | Print<br>Action<br>Profile | Health Summary |
| EYE CLINIC                          | C-WARD LASER | 0                      | yes                        | BRIEF CLINICAL |
| EYE CLINIC                          | C-WARD LASER | 2                      | yes                        | DR. SMITH      |
| HYPERTENSION                        | HALLPTR      | 1                      | no                         | EMERGENCY      |

## 4. User Preferences

### CPRS Reports Tab 'Health Summary Types List' Menu

Use the options in the CPRS Reports Tab 'Health Summary Types List' Menu to select the Health Summary Types to list on the Reports Tab, arrange the order of these Health Summaries on the list, and to the user's preferences.

The CPRS Reports Tab 'Health Summary Types List' Menu contains four options:

- 1 Display 'Health Summary Types List' Defaults
- 2 Precedence of 'Health Summary Types List'
- 3 Method of compiling 'Health Summary Types List'
- 4 Edit 'Health Summary Types List' Parameters

### Display 'Health Summary Types List' Defaults

Use this option to display the list of Health Summary Types that will be contained in the 'Health Summary Types' box on the Reports Tab in CPRS.

The display includes the precedence of parameters, the method for building the list, and finally the list that will appear on the Reports Tab in CPRS.

**Precedence of Parameters** - Health Summary Types can be established for the system and for the users. Additionally, there are Nationally exported Health Summary Types. This precedence indicates the order in which these types will be displayed (i.e., display user-defined types before system-defined types).

**Method** - The list can be built either by overwriting the list with each higher precedence of Health Summary Types or by appending each level of precedence to the list (prior to this option, the only choice was overwriting the list).

**List** - A list of Health Summary Types that will appear in the 'Health Summary Types' box on the Reports Tab will be listed.

NOTE: If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to display the 'Health Summary Types List' defaults.

*Without the GMTSMGR Key:*

|  |                               |                             |
|--|-------------------------------|-----------------------------|
| Health Summary Types list for CPRS Reports Tab                             |                               | JUL 17, 2001                |
| -----  |                               |                             |
| Precedence of Parameters:  |                               | USR;SYS;NAT                 |
| 1  | User preferences              |                             |
| 2  | System defined                |                             |
| 3  | National Health Summary Types |                             |
| Method for building the List:  |                               | Append                      |
| Add User Defined Summary Types to the list, then                           |                               |                             |
| Append with System Defined Summary Types (if found), then                  |                               |                             |
| Add National Defined Summary Types (if found)                              |                               |                             |
| The Health Summary Types box will list the following Health Summary Types: |                               |                             |
| User defined types   | 1                             | GMTS HS ADHOC OPTION        |
|  | 2                             | SURGERY                     |
|  | 3                             | RADIOLOGY                   |
| System defined types   | 4                             | DIABETES (1)                |
|  | 5                             | AC CLINICAL SUMMARY         |
|  | 6                             | PAIN MANAGEMENT             |
| National types   | 7                             | REMOTE CLINICAL DATA (1Y)   |
|  | 8                             | REMOTE CLINICAL DATA (3M)   |
|  | 9                             | REMOTE CLINICAL DATA (4Y)   |
|  | 10                            | REMOTE DEMO/VISITS/PCE (1Y) |
|  | 11                            | REMOTE DEMO/VISITS/PCE (3M) |
|  | 12                            | REMOTE LABS ALL (1Y)        |
|  | 13                            | REMOTE LABS ALL (3M)        |
|  | 14                            | REMOTE LABS LONG VIEW (12Y) |

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user preference.



## Precedence of 'Health Summary Types List'

Use this option to select the defined Health Summary Types to include on the list and arrange them in the order (precedence) that they should appear on the list.

Currently there are three groups of Health Summary Types that may be predefined and made available on the Reports Tab of CPRS.

**SYS** Health Summary Types may be defined for all users on the system.

**USR** Health Summary Types may be defined for a single user on the system.

**NAT** Nationally exported Health Summary Types (NAT) defined for system users or a single user are treated independently to keep them together in the list box.

In this option, you must first select those Health Summary Type groups (SYS, USR, or NAT) to include on the Reports Tab, then specify the order in which they will appear on the Reports Tab.

**NOTE:** If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to edit the precedence.

*Without the GMTSMGR Key:*

```
GUI Reports Tab, Health Summary Type List (Contents)

Include User Preferred Health Summary Types:  (Y/N)  Y//  <RET>ES
System Defined Health Summary Types:  (Y/N)  Y//  <RET>ES
National Types (Remote Data Views):  (Y/N)  Y//  <RET>ES

You have selected multiple Health Summary types to be listed on the CPRS
reports tab, in the Health Summary Types box.  Now you must select the
order in which you want these to be displayed.

Order to Display Included Health Summary Types

    1  User Preferred Health Summary Types
    2  System Level Health Summary Types
    3  Nationally Exported Health Summary Types

Select the 1st to be listed:  1//  <RET>

    1  System Level Health Summary Types
    2  Nationally Exported Health Summary Types

Select the 2nd to be listed:  1//  <RET>
```

```
You have selected three Health Summary Types, arranged
in the following order:
```

- 1 User Preferred Health Summary Types
- 2 System Level Health Summary Types
- 3 Nationally Exported Health Summary Types

```
Is this correct? (Y/N) Y// Y
```

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user preference.

### **Method of compiling ‘Health Summary Types List’**

Use this option to see how the list of Health Summary Types is to be built.

**Overwrite** - System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will replace the System defined Health Summary Types already on the list.

**Append** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will added to the list along with the System-defined types.

**NOTE:** If you are a holder of the GMTSMGR Key, you will be prompted for the name of the user to edit the method.

*Without the GMTSMGR Key:*

```
CPRS Reports Tab, Health Summary Type List (Order)
```

```
Append selected Health Summary Types to the list
Overwrite selected Health Summary Types to the list
```

```
Select Append/Overwrite (A/O): A// <Enter>ppend
```

*With the GMTSMGR Key:*

Same as above, except the additional prompt for the name of the user to edit the user method.

### **Edit 'Health Summary Types List' Parameters**

Use this option to add, edit, or delete a Health Summary Type from the list of Health Summary Types defined by the user. If you are a holder of the GMTSMGR Key, you can also use this option to edit the Health Summary Types defined for the System. Also, if you are the holder of the GMTSMGR key, you will be prompted for the name of the user to edit their list of preferred Health Summary Types.

*Without the GMTSMGR Key:*

Adding the Health Summary Type 'REMOTE CLINICAL DATA (1Y)' to the list of preferred Health Summary Types to be displayed for the user on the CPRS Reports Tab:

```

Edit the CPRS Health Summary Types list on the reports tab

----- Setting GUI Health Summary Type List for User: USER,LOCAL -----
Select Sequence: 15
Are you adding 15 as a new Sequence? Yes// <Enter> YES

Sequence: 15// <Enter> 15
Health Summary: REMOTE CLIN
    1  REMOTE CLINICAL DATA (1Y)
    2  REMOTE CLINICAL DATA (3M)
    3  REMOTE CLINICAL DATA (4Y)
CHOOSE 1-3: 1  REMOTE CLINICAL DATA (1Y)
Select Sequence: <Enter>
```

*With the GMTSMGR Key:*

Adding the Health Summary Type 'REMOTE CLINICAL DATA (1Y)' to the list of preferred Health Summary Types to be displayed for all users on the **system** on the CPRS Reports Tab:

```

Allowable Health Summary Types may be set for the following:

    2  User          USR      [choose from NEW PERSON]
    4  System        SYS      [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 4  System  DEVCUR.ISC-SLC.VA.GOV
```

```
- Setting Allowable Health Summary Types for System: DEVCUR.ISC-SLC.VA.GOV -  
Select Sequence: 8  
Are you adding 8 as a new Sequence? Yes// <Enter> YES  
  
Sequence: 8// <Enter> 8  
Health Summary: REMOTE CLIN  
    1  REMOTE CLINICAL DATA (1Y)  
    2  REMOTE CLINICAL DATA (3M)  
    3  REMOTE CLINICAL DATA (4Y)  
CHOOSE 1-3: 1  REMOTE CLINICAL DATA (1Y)  
Select Sequence:
```

## 5. Site Preferences

### CPRS Health Summary Display/Edit Site Defaults Menu

Use the options in the CPRS Health Summary Display/Edit Site Defaults Menu to display the site defaults, select the Health Summary Types to list on the Reports Tab, edit the method of building the list (append/overwrite), edit allowable entities for the list (i.e., User, System, Division, etc.), or resequence the allowable entities in the order they should be appear on the list.

The CPRS Health Summary Display/Edit Site Defaults Menu contains five options:

- 1 Display Site Health Summary List Defaults
- 2 Edit 'Health Summary Type List' Parameters
- 3 Edit Default HS Type List Compile Method
- 4 Add/Edit Allowable Entities for HS List
- 5 Resequence Allowable Entities for HS List

### Display Site Health Summary List Defaults

Use this option to display the site defaults for building the list of Health Summary Types on the Reports Tab in CPRS. The display includes the method for building the list and the precedence of parameters. These default values will be used in the event that the user has not established user preferences. This option is similar to the option GMTS GUI HS LIST DEFAULTS (Display 'Health Summary Types List' Defaults), which allows the user to display user preferences.

**Method** - The list can be built either by overwriting the list with each higher precedence of Health Summary Types or by appending each level of precedence to the list (prior to this option, the only choice was overwriting the list).

**Precedence of Parameters** - Health Summary Types can be established for the system and for the users. Additionally, there are Nationally exported Health Summary Types. This precedence indicates the order in which these types will be displayed (i.e., display user-defined types before system-defined types).

```

Display default Health Summary Type list for SALT LAKE CITY OIFO

DEVICE: HOME// ;;9999 ANYWHERE

SALT LAKE CITY OIFO Defaults for CPRS Reports Tab          JAN 14, 2002

-----
Precedence of Parameters:          DIV;USR;CLS;SYS

1  Division defined
2  User preferences
3  Class defined
4  System defined

Method for building the List:      Append

Add Division Defined Summary Types to the list, then
Append with User Defined Summary Types (if found), then
Append with Class Defined Summary Types (if found), then
Append with System Defined Summary Types (if found)

```

## Edit 'Health Summary Types List' Parameters

Use this option to add, edit or delete a Health Summary Type from the list of Health Summary Types defined for a given entity (System, Division, User, etc.). This option is similar to the option GMTS GUI HS LIST PARAMETERS (Edit 'Health Summary Types List' Parameters), which allows the user to add/edit Health Summary Types for the 'User' entity.

```

Select CPRS Health Summary Display/Edit Site Defaults Option:
Edit 'Health Summary Types List' Parameters

Allowable Health Summary Types may be set for the following:

2  Division      DIV      [choose from INSTITUTION]
3  User          USR      [choose from NEW PERSON]
8  Class         CLS      [choose from USR CLASS]
9  System        SYS      [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 2  Division      INSTITUTION
Select INSTITUTION NAME:      SALT LAKE CITY OIFO  UT  ISC

- Setting Allowable Health Summary Types for Division: SALT LAKE CITY
OIFO

Select Sequence: 9

Are you adding 9 as a new Sequence? Yes// y  YES

Sequence: 9// <Enter>      9

Health Summary: rad

1  RAD

```

```

2  RAD NAN
3  RADIOLOGY
4  RADIOLOGY ONLY
5  RADIOLOGY PROFILE

Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5: 3  RADIOLOGY

Select Sequence: ?

      Sequence                Value
      -----                -
      1                      GMTS HS ADHOC OPTION
      2                      DEMOGRAPHICS
      3                      SURGERY
      9                      RADIOLOGY

```

### Edit Default HS Type List Compile Method

Use this option to see how the list of Health Summary Types is to be built. This method will be used for all users who do not have user preferences set. This option is similar to the option GMTS GUI HS LIST METHOD (Method of compiling 'Health Summary Types List') which allows the user to define their Health Summary List compile method preference.

**Overwrite** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will replace the System-defined Health Summary Types already on the list.

**Append** – System-defined Health Summary Types are added to the list. If there are User-defined Health Summary Types, then they will added to the list along with the System-defined types.

```

Site Default Method for building 'Health Summary Types'
List on the CPRS Reports Tab

Append selected Health Summary Types to the list
Overwrite selected Health Summary Types to the list

Select Append/Overwrite (A/O): A// <Enter> Append

```

## Add/Edit Allowable Entities for HS List

Use this option to add or delete an entity (System, Division, User, etc) from the list of allowable entites for the parameter 'ORWRP HEALTH SUMMARY TYPE LIST' used on the CPRS Reports Tab to display the Health Summary Types List.

```
ORWRP HEALTH SUMMARY TYPE LIST' ALLOWABLE ENTITIES

Select ALLOWABLE ENTITIES PRECEDENCE: ?

    Answer with ALLOWABLE ENTITIES PRECEDENCE

Choose from:
2          INSTITUTION
3          NEW PERSON
8          USR CLASS

    You may enter a new ALLOWABLE ENTITIES, if you wish
    Type a Number between 0 and 999.99, 2 Decimal Digits

Select ALLOWABLE ENTITIES PRECEDENCE: 9

Are you adding '9' as a new ALLOWABLE ENTITIES (the 4TH for
this PARAMETER DEFINITION)? No// y (Yes)

Select PARAMETER ENTITY NAME: ?
Answer with PARAMETER ENTITY FILE NUMBER, or NAME, or PREFIX
Do you want the entire PARAMETER ENTITY List? y (Yes)
Choose from:
4          DIVISION
4.2        SYSTEM
49         SERVICE
100.21     TEAM (OE/RR)
200        USER
8930       CLASS

Select PARAMETER ENTITY NAME: system
```

## Resequence Allowable Entities for HS List

Use this option to resequence the order in which the allowable entites for parameter 'ORWRP HEALTH SUMMARY TYPE LIST' are used in building the list of Health Summary Types for the CPRS Reports Tab. This order is used for any user who does not have user preferences set.

```
Parameter "ORWRP HEALTH SUMMARY TYPE LIST" has 4 allowable entities
which may have the Health Summary Types on the CPRS reports tab
and are used in the following order:

1  System level defined Health Summary Types
2  User defined Health Summary Types
3  Division level defined Health Summary Types
4  Class defined Health Summary Types
```



Are these in the correct order for your site? Y// **NO**

Please select the order in which you want these to be entities to be used.

- 1 System level defined Health Summary Types
- 2 User defined Health Summary Types
- 3 Division level defined Health Summary Types
- 4 Class defined Health Summary Types

Select the 1st entity to be used: 1// **3**

- 1 System level defined Health Summary Types
- 2 User defined Health Summary Types
- 3 Class defined Health Summary Types

Select the 2nd entity to be used: 1// **1**

- 1 User defined Health Summary Types
  - 2 Class defined Health Summary Types
- Select the 3rd entity to be used: 1// **2**

You have selected to resequenced the Health Summary Type entities in the following order:

| FROM (Current) | TO (Resequenced) |
|----------------|------------------|
| -----          | -----            |
| 1 System       | Division         |
| 2 User         | System           |
| 3 Division     | Class            |
| 4 Class        | User             |

Is this OK? Y// **<Enter> YES**



## **Chapter 5: Helpful Hints**



## Helpful Hints—Q & A

---

### ***Q. How Can I Create New Components?***

- A.** We encourage sites to submit E3Rs for new components (or enhancements to existing components) that they believe will be useful on a national basis. The Health Summary Expert Panel evaluates these requests, and if approved, they will be provided as patches or in a future version of Health Summary, depending on the priority given to the request.

Sites also may modify existing components or create new components for their local needs, such as enhancements to one of the components that Health Summary provides, a totally new one that accesses VISTA data that Health Summary currently doesn't provide a component for, or a component to access non-VISTA supported (Class III software) packages.

■ **Note:** IRMFOs do not provide support for locally developed components.

A Health Summary basket has been set up on SHOP,ALL where sites can put their locally developed component routines, in order to share this information with the rest of the VISTA community. We encourage you to take a look at what has already been done, as this may save you some time.

To access SHOP,ALL from FORUM:

1. Enter SHOP,ALL at your menu prompt and you'll be "logged" on to SHOP,ALL
2. Enter SURROGATE NAME: **SHOP,ALL**
3. Select Mailman Option: **Read Mail**
4. Enter the Health Summary mail basket.

### ***Q. Will the components we created at our VAMC be wiped out when we install Version 2.7?***

- A.** No, local components will be preserved when you install V. 2.7.

### ***Q. Why doesn't the up-arrow (^) always take me out of Health Summary when I enter it as described on the screen (and in the manual)?***

- A.** Normally, you can exit the Health Summary program by entering an ^ at a prompt. However, if you have selected more than one patient to print Health Summaries for, a single up-arrow will take you to the next patient's Health Summary. To exit the program in these circumstances, enter double up-arrows (^ ^).

**Q. *Can I schedule nightly batch jobs to print before weekends or holidays?***

- A. The nightly batch job has been enhanced to recognize non-workdays (weekends and holidays). Data will not be printed out on non-workdays. For example, if you want a Health Summary type printed out for Monday clinics one day in advance, it will now print on the previous Friday rather than on Sunday.

**Q. *Why doesn't the component list display in alphabetical order on the Ad Hoc menu?***

- A. Components are displayed by "Default Header" — an order that doesn't appear to be alphabetical. The order is based on the *actual* (technical) component name. For example, "Blood Availability" is the default header name, whereas the component name is LAB BLOOD AVAILABILITY. If you need a more detailed explanation of this, contact your Clinical Coordinator or IRMS.

**Q. *Is there a way for us to have Health Summaries print with encounter forms for certain clinics or appointments?***

- A. The Integrated Billing Package (Encounter Form Utilities) includes a Print Manager that lets sites define reports to print along with encounter forms for specific clinics, divisions, and appointments. See the *IB Encounter Form Utilities User Manual* for further information.

**Q. *Can I print bar codes on my Action Profiles that are scheduled to print in tandem with Health Summary?***

- A. Yes, a site parameter has been added to allow sites to specify whether or not to print bar codes on Action Profiles which are queued to print with Health Summaries (dependent on whether the printer is set up to print bar codes).

**Q. *When our site created Health Summary types and entered names thus: WELBY,MARCUS, why couldn't we review existing components through the option, "Create/Modify Health Summary Type"?***

- A. For technical reasons involving FileMan conventions, commas can't be used in certain fields. We recommend that you avoid using commas in names of Health Summary types.

# Glossary





# Glossary

---

|                                    |  |
|------------------------------------|--|
| <b>Ad Hoc Health Summary</b>       | A temporary health summary that lets you select health summary components, time and occurrence limits, and selection items for a particular patient.   |
| <b>Components</b>                  | Elements of data from <b>VISTA</b> packages that make up the health summary report (e.g., Demographics).   |
| <b>DHCP</b>                        | Decentralized Hospital Computer Program—the former name for <b>VISTA</b> , the VA program responsible for installing an integrated computer system in all VA hospitals and facilities.   |
| <b>Default</b>                     | Prompts that have an answer followed by double slashes (//) are called defaults; this means a response has been pre-selected, based on the most likely response or the previous response to this prompt. For example, the prompt “Time Limit:” may have a default of 1 year for Lab Orders, and would appear as: Time Limit: 1Y//. |
| <b>Device</b>                      | A printer or computer terminal screen. See the <i>DHCP User’s Guide to Computing</i> for information about basic VISTA computer skills, including printing information.  |
| <b>Hospital Location Displayed</b> | For some PCE components, when this flag is enabled, the Hospital Location abbreviation will be displayed.  |
| <b>ICD Text Displayed</b>          | For some components, Diagnosis Text can be customized (e. g., long form, short form, code only, or no form of ICD Diagnosis).  |
| <b>Lock</b>                        | Restricts edit access for a given health summary type to the holders of any valid security key. For example, the GMTSMGR key is required to edit summary types that are locked by the GMTSMGR lock. A lock may also be designated when a health  |

summary type is created. For example, someone creating a Pathology Health Summary Type may want to enter LRSUPER as the lock, thereby giving edit access to any holder of the LRSUPER security key.

**Non-destructive**

In the Health Summary package, non-destructive means that Health Summary does not edit the data from the **VISTA** package from which it extracts its information.

**Occurrence Limits**

The number of past occurrences that will be reported on a health summary (e.g., the last five occurrences).

**Owner**

The creator of a health summary type. Owners and holders of the GMTSMGR security key have sole access to modify their health summary type(s).

**Provider Narrative Displayed**

For some components, when this flag is enabled and a provider enters narrative text, the text will be displayed.

**Selection Items**

For some components (e.g., Lab Tests Selected, Vital Signs Selected), you can specify the data elements to be included in the components, such as occurrence and time limits.

**Summary Order**

The order in which components appear in a health summary, as defined by the creator of a Summary Type.

**Summary Type**

The structure or template containing defined components and their unique characteristics with occurrence and time limits, and selection items. Used to print health summaries for patients.

**Time Limits**

The time period of reference included on a health summary for a particular component (e.g., 2D, 1M, 1Y for two days, one month and one year).

**VISTA**

The VA computer system in VA facilities.

# Appendices

**Appendix A - Request for New Health Summary Type**

**Appendix B - Comment and Problem Report**

**Appendix C - Health Summary Component Description List**

**Appendix D - VISTA & Health Summary Conventions**



## Appendix A — Request for New Health Summary Type

To: Health Summary Coordinator

From:

Please create a health summary type consisting of the following components in the order indicated, with maximum occurrence, time limit and selection(s) as noted.

[illegible]

For a list of available components and whether time and/or occurrence limits, hospital location, ICD text and provider narrative displays, and selection items apply, use the List Health Summary Components option.



## Appendix B—Comment and Problem Report

---

### Health Summary Program and Documentation

Please feel free to report any package or documentation comments and suggestions on this form. This form should be returned to:

Health Summary Project Manager  
 Dept. of Veterans Affairs  
 IRM Field Office, Salt Lake Campus  
 295 Chipeta Way  
 SLC, UT 84108-1286

Program Change or Suggestion:

Documentation Change or Suggestion:

From --

Name:

Site:

Phone Number:

---

## Appendix C—Health Summary Component Description List

---

The following list can be produced (displayed online or printed) from the “List Health Summary Component Descriptions” option on the Information Menu.

### Health Summary Components

| Component Name                        | Description  | Abbreviation |
|---------------------------------------|--|--------------|
| -----                                 |  |              |
| <b>ADVANCE DIRECTIVE</b>              |  | <b>CD</b>    |
|                                       | <p>This component contains advance directive notes entered using the Text Integration Utilities (TIU). Advance Directives are a type a progress note which includes clinical information that clinicians need to be alerted to. Time and maximum occurrent limits apply to this component.</p> <p>If this component is printed to either a CRT or another device type, information will include title, text of note, electronic signature block, and date/time posted.</p> |              |
| <b>ADVERSE REACTIONS/ALLERG BRIEF</b> |  | <b>BADR</b>  |
|                                       | <p>This component provides patient allergy/adverse reaction information from the Allergy Tracking System. It provides a brief patient list of all known food, drug and environmental allergies or adverse reactions (e.g., hay fever).</p>   |              |
| <b>ADVERSE REACTIONS/ALLERGIES</b>    |  | <b>ADR</b>   |
|                                       | <p>This component provides patient allergy/adverse reaction information from the Allergy Tracking System. It provides a list of all known food, drug and environmental allergies or adverse reactions (e.g., hay fever). Data element included are type of reaction, mechanism of reaction, causative agent, verification status, signs/symptoms for the reaction, the originator, and comments.</p>   |              |
| <b>CLINICAL REMINDERS BRIEF</b>       |  | <b>CMB</b>   |
|                                       | <p>This is a brief version of the CLINICAL REMINDERS MAINTENANCE component.</p>  |              |
| <b>CLINICAL REMINDERS DUE</b>         |  | <b>CR</b>    |
|                                       | <p>This component lists only clinical reminders that are due now. If the date the reminder was last satisfied is known it is listed under LAST. Otherwise the word unknown is printed.</p>   |              |
| <b>CLINICAL REMINDERS MAINTENANCE</b> |  | <b>CM</b>    |
|                                       | <p>This component lists reminders that are due and not due as does the CRS component. In addition it shows why the reminder is due or not due.</p>   |              |
| <b>CLINICAL REMINDERS SUMMARY</b>     |  | <b>CRS</b>   |
|                                       | <p>This component is similar to PCE CLINICAL REMINDERS DUE except that it shows all reminders</p>  |              |



not just those that are due. The information will include the NEXT due date, or N/A, and the LAST DATE. N/A reminders will be displayed unless the IGNORE ON N/A field is set.

#### CLINICAL WARNINGS

#### CW

This component contains clinical warning notes entered using the Text Integration Utility (TIU). Clinical Warnings are a type of progress note which includes clinical information which clinicians need to be alerted to. No time or maximum occurrence limits apply to this component.

If this component is printed out on a CRT, information will include title, text of note, electronic signature block, and date posted. If the printout is to another device type, information will include electronic signature block and date posted to ensure security of information.

#### COMPENSATION AND PENSION EXAMS

#### CP

This component prints all compensation and pension exams for a given patient by user-specified time and occurrence limits.

#### CRISIS NOTES

#### CN

This component contains crisis notes entered using the Text Integration Utility (TIU). Crisis Notes are a type of progress note which contains important information for anyone who deals with a patient. No time or maximum occurrence limits apply to this component.

If this component is printed out on a CRT, information will include title, text of note, electronic signature block, and date posted. If the printout is to another device type, information will include electronic signature block and date posted to insure security of information.

#### DIETETICS

#### DI

This component contains information from the Dietetics package. Time and occurrence limits apply to this component. Data presented include: diet orders, start/stop dates, type of service (tray, e.g.); nutritional status, date assessed; supplemental feedings, start/stop dates; tube feedings, start/stop dates, strength of product, quantity ordered, and daily dosages.

Note: When a time limit is selected, the data presented reflects orders initiated within the time period.

#### DISCHARGE SUMMARY

#### DCS

This component prints all discharge summaries (including report text) for user-specified time and occurrence limits.

#### DISCHARGE SUMMARY BRIEF

#### BDS

This component prints the admission, discharge and cosignature dates, as the dictating and approving provider names, and signature status of all discharge summaries for user-specified time

and occurrence limits.

**GLOBAL ASSESSMENT FUNCTIONING**

**GAF**

This component displays the GAF score taken from the Global Assessment Functioning scale to evaluate the psychological, social, and occupational functioning on a hypothetical continuum of mental health/illness. Also displayed is the date of the assessment and the name of the health care professional who provided the assessment.

**IMAGING IMPRESSION**

**II**

This component contains impressions from the Radiology/Nuclear Medicine package. Time and maximum occurrence limits apply. Data presented include: study date, procedure(s), status, diagnostic text and radiologist's or nuclear med physician's impression (narrative).

Only imaging impressions which have been verified are reported.

**IMAGING IMPRESSION SELECTED**

**SII**

This component contains impressions from the Radiology/Nuclear Medicine package. Time and occurrence limits apply. Data presented include: study date, procedure(s), status, diagnostic text, and radiologist's or nuclear med physician's impression (narrative) for the procedures selected by the user (e.g., CHEST 2 VIEWS - PA & LAT).

Only imaging impressions which have been verified are reported.

**IMAGING PROFILE**

**IP**

This component contains information from the Radiology/Nuclear Medicine package. Time and maximum occurrence limits apply. Data presented include: study date, procedure(s) with status(es), report status, staff and resident interpreting physicians, and the narrative fields modifier, history, report, diagnostic text and impression.

Only imaging profiles which have been verified are reported.

**IMAGING STATUS**

**IS**

This component contains procedure statuses from the Radiology/Nuclear Medicine package. Time and maximum occurrence limits apply. Data presented include: request date/time, status, procedure, scheduled date/time, and provider name.

**LAB BLOOD AVAILABILITY**

**BA**

This component contains information from the Blood Bank module of the Lab Package. Time and occurrence limits apply to this component. Data presented include: patient blood type (whether or not units have been assigned), unit expiration date, unit ID#, blood product(s), cross-match results, last known location, and a flag for autologous units.

Note: An asterisked date (e.g., \* 10/10/90)

indicates that the unit is due to expire within the next 48 hours.

**LAB BLOOD TRANSFUSIONS**

**BT**

This component contains information from the Blood Bank module of the Lab Package. Time and occurrence limits apply to this component. Data presented include: transfusion date and abbreviated blood products (with total number of units transfused for each, e.g., RBC (2)). A key of the abbreviations is presented at the bottom of the display to help identify any unfamiliar blood products.

**LAB CHEMISTRY & HEMATOLOGY**

**CH**

This component contains information extracted from the Lab package. Time and maximum occurrence limits apply to this component. Data presented include: collection date/time, specimen, test name, results (w/ref flag: High/Low/Critical), units, and Reference range. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. Results which include comments will be indicated with the symbol !!, in the event that the parameter is set to 0 or NO.

**LAB CUMULATIVE SELECTED**

**SCLU**

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select any number of atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. When comments are displayed, a lower case letter will be displayed to the left of the date for entries with comments. Comments will be displayed after all the results are displayed with comments being linked by the lower case letter. Up to 26 comments can be included.

**LAB CUMULATIVE SELECTED 1**

**SCL1**

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select as many as seven atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. When comments are displayed, a lower case letter will be displayed to the left of the date for entries with comments. Comments will be displayed after all the results are displayed with comments being linked by the lower case letter. Up to 26 comments can be included.

**LAB CUMULATIVE SELECTED 2**

**SCL2**

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select as many as seven atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. When comments are displayed, a lower case letter will be displayed to the left of the date for entries with comments. Comments will be displayed after all the results are displayed with comments being linked by the lower case letter. Up to 26 comments can be included.

**LAB CUMULATIVE SELECTED 3**

**SCL3**

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select as many as seven atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. When comments are displayed, a lower case letter will be displayed to the left of the date for entries with comments. Comments will be displayed after all the results are displayed with comments being linked by the lower case letter. Up to 26 comments can be included.

**LAB CUMULATIVE SELECTED 4**

**SCL4**

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select as many as seven atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format. Comments will also be conditionally displayed, depending on the value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. When comments are displayed, a lower case letter will be displayed to the left of the date for entries with comments. Comments will be displayed after all the results are displayed with comments being linked by the lower case letter. Up to 26 comments can be included.

**LAB CYTOPATHOLOGY**

**CY**

This component contains information extracted from the Cytopathology module of the Lab package. Time and maximum occurrence limits apply. Data presented include: collection date/time, accession number, specimen, gross description, microscopic exam, brief clinical history, and Cytopathology Diagnosis.

**LAB ELECTRON MICROSCOPY**

**EM**

This component contains information extracted

from the Electron Microscopy module of the Lab package. Time and maximum occurrence limits apply. Data presented include: collection date/time, accession number, specimen, gross description, microscopic exam, supplementary report description, brief clinical history, and EM Diagnosis.

#### LAB MICROBIOLOGY

#### MIC

This component contains information extracted from the Microbiology module of the Lab Package. Time and maximum occurrence limits apply. Data include: collection date/time, collection sample, site/specimen, specimen comment, tests, urine screen, sputum screen, sterility control, sterility results, comments for reports, smear/prep, acid fast stain Parasite Report, organism(s), Mycology Report, Bacteriology Report, Mycobacteriology Report, Gram Stain Result, Culture and Susceptibility, Antibiotic Serum Level, and remarks.

#### LAB MICROBIOLOGY BRIEF

#### BMIC

This component contains information extracted from the Lab package. Time and maximum occurrence limits apply to this component in addition to collection date/time, test names, specimen, report status, Culture and Susceptibility, Smear/Prep, Acid Fast Stain, Antibiotic Serum Level, and test results.

#### LAB ORDERS

#### LO

This component contains information extracted from the Lab package. Time and maximum occurrence limits apply. Data presented include: collection date (either actual or expected), lab test, provider, accession, date/time ordered, specimen, and date/time results available.

#### LAB ORDERS BRIEF

#### BLO

This component contains information extracted from the Lab package. Time and maximum occurrence limits apply. Data presented include: collection date/time, lab test name, specimen, urgency, and order status (e.g., ORDERED, COLLECTED, PROCESSING, COMPLETE).

#### LAB SURGICAL PATHOLOGY

#### SP

This component contains information extracted from the Surgical Pathology module of the Lab package. Time and maximum occurrence limits apply. Data presented include: collection date/time, accession number, specimen, gross description, microscopic description, brief clinical history, supplementary report description, frozen section and surgical path diagnosis.

#### LAB TESTS SELECTED

#### SLT

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select any number of atomic Lab tests. Data includes: collection date/time, specimen, test name, result, units and reference range. Comments will also be conditionally displayed, depending on the

value of the DISPLAY COMMENTS ON LABS Health Summary Site Parameter. Results which include comments will be indicated with the symbol !!, in the event that the parameter is set to 0 or NO.

Note: This component corresponds to the vertical format for the Lab package's cumulative reports.

**MAG IMAGING**

**MAGI**

This component lists the available images along with the procedure name and short description.

**MAS ADMISSIONS/DISCHARGES**

**ADC**

This component contains information from the MAS package. Time and occurrence limits apply to this component. Data presented include: date range of admission, ward, length of stay (LOS), last treating specialty, last provider, admitting diagnosis text, bedsection, principal diagnosis, diagnosis for longest length of stay (DXLS), and secondary ICD diagnoses.

**MAS ADT HISTORY**

**ADT**

This component contains information extracted from the MAS package. It can only be used with MAS Version 5 and up.

Time and maximum occurrence limits apply. Data presented include: movement date, movement type (ADM=Admission, TR=Transfer, TS= Treating Specialty, DC=Discharge), movement description, specialty, and provider.

**MAS ADT HISTORY EXPANDED**

**EADT**

This component contains information extracted from the MAS package. It is a consolidated view of all the MAS components. It can only be used with MAS Version 5 and up.

Time and maximum occurrence limits apply. Data presented include patient eligibility and rated disabilities. Movement data then follows with movement date, movement type (ADM=Admission, TR=Transfer, TS= Treating Specialty, DC=Discharge), movement description, specialty, and provider. Admissions include the admission diagnosis if the patient hasn't been discharged. Transfers included ward location and transfer facility. Treating specialties includes Specialty Transfers Diagnosis. Discharges include the data in the Discharge Diagnosis and Discharges components. Following the data for each admission ICD Procedures, and ICD Surgeries will be include if present.

**MAS CLINIC VISITS FUTURE**

**CVF**

This component provides a listing from the MAS scheduling module that contains future clinic visit dates, the clinic visited, and the appointment type.

**MAS CLINIC VISITS PAST**

**CVP**

This component contains information from the MAS scheduling module. Time and occurrence limits apply to this component. Data presented include: past clinic visits, dates, and a visit status (e.g., NO SHOW, INPATIENT VISIT). Note:

Cancellations and Unscheduled Visits are shown.

#### **MAS DEMOGRAPHICS**

#### **DEM**

This component contains the following patient demographic data (if available) from the MAS package: address, phone, county, marital status, religion, age, sex, occupation, period of service, POW status (e.g., Y or N), branch of service, combat status (e.g., Y or N), eligibility code, current (verified) eligibility status, service connected %, mean test, next of kin (NOK), NOK phone number and address.

#### **MAS DEMOGRAPHICS BRIEF**

#### **BDEM**

This component contains information from the MAS package. It provides brief patient demographic information including: address, phone number, age, sex, mean test, and eligibility code (e.g., service connected 50-100%).

#### **MAS DISABILITIES**

#### **DS**

This component provides information from the MAS package about a patient's eligibility code and eligibility status (Verified), and rated disabilities, including the disability percentage and whether the disability is service connected or non-service connected.

#### **MAS DISCHARGE DIAGNOSIS**

#### **DD**

This component contains information extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: Date range of admission through discharge, length of stay (LOS), Principal diagnosis, diagnosis for longest length of stay (DXLS), and secondary ICD discharge diagnoses.

Note: This component provides discharge diagnoses coded in the MAS PTF file. The occurrence limits are determined by the occurrence of admissions.

#### **MAS DISCHARGES**

#### **DC**

This component contains information extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: date of discharge, DXLS, bedsection, disposition type, disposition place, and outpatient treatment flag.

Note: The occurrence limits are determined by the occurrence of admissions.

#### **MAS PROCEDURES ICD CODES**

#### **PRC**

This component contains MAS coded procedures, by admission, extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: procedure date, procedure name, and ICD-9CM procedure codes.

Note: The occurrence limits are determined by the occurrence of admissions.

#### **MAS SURGERIES ICD CODES**

#### **OPC**

This component contains MAS coded surgeries, by admission, extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: surgery date, procedure

name, and ICD-9CM procedure codes.

Note: The occurrence limits are determined by the occurrence of admissions.

**MAS TRANSFERS**

**TR**

This component contains information extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: transfer date, type, destination, and provider (when available).

Note: The occurrence limits are determined by the occurrence of admissions.

**MAS TREATING SPECIALTY**

**TS**

This component contains information extracted from the MAS package. Time and occurrence limits apply to this component. Data presented include: treating specialty change date/time, new treating specialty, (admission date), and provider.

Note: The occurrence limits are determined by the occurrence of admissions.

**MEDICINE ABNORMAL BRIEF**

**MEDA**

This component contains information extracted from the Medicine package. Data presented include: procedure date/time, medical procedure name, and result (e.g., normal, abnormal, borderline). Time and maximum occurrence limits apply.

**MEDICINE BRIEF REPORT**

**MEDB**

This is the brief procedure view defined by the Medicine View file. This output can be managed by the local IRM staff. Time and maximum occurrence limits apply.

**MEDICINE FULL CAPTIONED**

**MEDC**

This prints the full set of results which are present in each procedure. No labels will be included which have no values associated with them. Time and maximum occurrence limits apply.

**MEDICINE FULL REPORT**

**MEDF**

This component provides a full report of procedures as defined by the Medicine View file. This report includes labels which have no value associated with them. Time and maximum occurrence limits apply.

**MEDICINE SUMMARY**

**MEDS**

This component provides a one line summary view of Medicine procedures which is extracted from the Medicine package. Time and maximum occurrence limits apply. Data presented include: procedure date/time, medical procedure name, and result (e.g., normal, abnormal, borderline). Note: This component is a summary of procedure statuses.

**MENTAL HEALTH PHYSICAL EXAM**

**MHPE**

The Mental Health Physical Exam component contains the results of the physical examination concerning patient's overall condition associated with the systems identified. This data is being extracted from the Medical Record (# 90) file.



# ONCOLOGY

## ONC

This component will extract selected data items from the ONCOLOGY PRIMARY file.

# ORDERS CURRENT

## ORC

This component contains current orders from the OE/RR package. Since the OE/RR package integrates all orders for the ancillary services, the orders will be reported in most recent orders first sequence without concern for the ancillary package the order originated from/for. Current orders are defined as those orders with an OE/RR order status other than discontinued or expired.

The component information includes item ordered, OE/RR order status, start date, and stop date. OE/RR order status abbreviations include "blank"=Active, "c"=Complete, "dc"=Discontinued, "e"= expired, "?"=Flagged, "h"=Hold, "i"=incomplete, "p"=pending, "s"=scheduled.

# PCE EDUCATION

## ED

This component lists the patient education topics and a brief assessment of the patient's understanding of the topic for a particular patient for user-specified time and occurrence limits. Some examples of topics are complications, diet, disease process, exercise, follow-up care, general information, lifestyle adaptations, medications, nutrition, smoking, etc.

# PCE EDUCATION LATEST

## EDL

This component lists the latest patient education for each topic and a brief assessment of the patient's understanding of the topic for a particular patient for a user-specified time limit. Some examples of topics are complications, diet, disease process, exercise, follow-up care, general information, lifestyle adaptations, medications, nutrition, smoking, etc.

# PCE HEALTH FACTORS ALL

## HF

This component lists all the health factors associated with a particular patient for user-specified time and occurrence limits. The list will display health factors by category and include a level of severity for each health factor including Minimal(M), Moderate(MO), and Heavy/Severe(H).

Set the occurrence limit to 1 to list the latest unique health factors within each category. (E.g. If there were 12 "Non-Smoker" health factor entries, only the latest "Non-Smoker" entry would display.)

# PCE HEALTH FACTORS SELECTED

## SHF

This component allows a user to select specific health factors by category and then lists the health factors, which apply to a particular patient for user-specified time and occurrence limits.

Set the occurrence limit to 1 to list the latest unique health factors for each selected category.

(E.g. If there were 12 "Non-Smoker" health factor entries, only the latest "Non-Smoker" entry would display.

**PCE OUTPATIENT ENCOUNTERS**

**OE**

This component lists outpatient diagnosis (ICD-9) and procedure (CPT) for a particular patient. The user can specify item and occurrence limits, whether hospital location should be displayed or not, the format of ICD-9 data (e.g. code only, long text, short text or no ICD-9 data), and whether the provider narrative should be displayed or not.

**PHARMACY INTRAVENOUS**

**RXIV**

This component contains IV orders extracted from the Pharmacy package. Only time limits apply. Data presented include: start date, stop date, drug (additives), dose, status, solutions and infusion rates.

Note: If no time limit is defined, only active IV orders are reported. If a time limit is defined, all IV orders which have an expiration or cancel date within the time limit range are reported.

**PHARMACY OUTPATIENT**

**RXOP**

This component contains information from the Outpatient Pharmacy package. Only time limits apply. Data presented include: drug, prescription number, status expiration/cancellation date (when appropriate), quantity, issue date, last fill date, refills remaining, provider, and cost/fill (when available).

Note: If no time limit is defined, only active outpatient orders are reported. If a time limit is defined, all outpatient pharmacy orders which have an expiration or cancel date within the time limit range are reported.

**PHARMACY UNIT DOSE**

**RXUD**

This component contains Unit Dose information extracted from the Pharmacy package. Only time limits apply. Data presented include: Drug, dose, pharmacy status, start date, stop date, and sig (which includes schedule instructions and route).

NOTE: If no time limit is defined, all active orders are reported. If a time limit is defined, all unit dose orders which have an expiration or cancel date within the time limit range are reported.

**PROBLEM LIST ACTIVE**

**PLA**

This component lists all known active problems for a patient. Information displayed: ICD data (based on ICD Text Display parameter), provider narrative (unless Provider Narrative Display parameter is set to NO), date of onset, date last modified, the responsible provider, and all active comments.

**PROBLEM LIST ALL**

**PLL**

This component lists all known problems, both

active and inactive, for a patient. Information displayed: ICD data (based on ICD Text Display parameter), provider narrative (unless Provider Narrative Display parameter is set to NO), date of onset (if problem is active), date problem resolved (if inactive), date last modified, the responsible provider, and all active comments for the problems.

#### PROBLEM LIST INACTIVE

#### PLI

This component lists all known inactive problems for a patient. Information displayed: ICD data (based on ICD Text Display parameter), provider narrative (unless Provider Narrative Display parameter is set to NO), date problem resolved, date last modified, the responsible provider, and all active comments for the problem.

#### PROGRESS NOTES

#### PN

This component contains progress notes entered using the Text Integration Utilities (TIU) and Mental Health packages. Time and maximum occurrence limits apply to this component. Data presented include: Progress note date/time written, title, text of note, electronic signature block (including possible cosignature and cosigner comments), and the note's correction text and correction date/time.

Only those notes which have been signed with an electronic signature or electronically marked signed on chart will be reported.

#### PROGRESS NOTES BRIEF

#### BPN

This component contains limited information from progress notes entered using the Text Integration Utility (TIU) or the Mental Health packages. Time and maximum occurrence limits apply. Data presented includes: Progress note date/time, title, author and last correction date/time.

Only those notes which have been signed with an electronic signature or electronically marked signed on chart will be listed.

#### PROGRESS NOTES SELECTED

#### SPN

This component allows for the selection of specific progress notes by document title. These progress notes were entered using the Text Integration Utilities (TIU). Data presented include: Progress note date/time written, title, text of note, electronic signature block (including possible cosignature and cosigner comments), and the note's correction text and correction date/time.

Only those notes which have been signed with an electronic signature or electronically marked signed on chart will be reported.

#### SOCIAL WORK

#### SW

This component provides information from the Social Work package about a patient's Social/Family Relationship, Current Substance Abuse Problems, and Psycho-Social Assessment.

#### SPINAL CORD DYSFUNCTION

#### SCD

This component provides patient data from the Spinal Cord Dysfunction package. A patient's registration status, highest level of injury, information source for SCD, completeness of injury and extent of paralysis will be displayed. The following data will be displayed with time and maximum occurrence limits applied: date of onset, etiology, onset of SCD caused by trauma, date recorded, motor score, cognitive score, total score and record type.

**SURGERY NON OR PROCEDURES**

**NSR**

This component will print out data for NON-OR procedures only. Time and maximum occurrence limits apply. The data presented will be: provider specialty, provider, procedure status, attending, principal diagnosis, procedures performed, principal anesthesiologist, indication for procedure, and operative findings.

**SURGERY ONLY REPORTS**

**SRO**

This component will return surgery procedures only and will NOT include NON-OR procedures. Time and maximum occurrence limits apply. For Surgical procedures the data presented will be: surgery date, surgeon, surgery report status, pre-operative diagnosis, post-operative diagnosis, surgeon's dictation, current procedural terminology operation code and text, and principal anesthesiologist.

**SURGERY REPORTS**

**SR**

This component contains information from the Surgery package. Time and maximum occurrence limits apply. It includes NON-OR procedures as well as Surgical procedures. The data returned will differ for surgical and NON-OR procedures.

For Surgical procedures the data presented will be: surgery date, surgeon, surgery report status, pre-operative diagnosis, post-operative diagnosis, surgeon's dictation, current procedural terminology operation code and text, and principal anesthesiologist.

For NON-OR procedures the data presented will be: provider specialty, provider, procedure status, attending, principal diagnosis, procedures performed, principal anesthesiologist, and indications for procedure.

**SURGERY REPORTS BRIEF**

**BSR**

This component contains surgery report statuses extracted from the Surgery package. Time and maximum occurrence limits apply. Data presented include: surgery date, surgical procedure, and report status (e.g., COMPLETE).

**SURGERY SEL NON OR PROCEDURES**

**SNSR**

This component will return selected NON-OR procedures. The user will be allowed to select one or more CPT codes to search for. The NON-OR procedures will be displayed if the selected CPT code(s) match the principal procedure code. Time and maximum occurrence limits apply. The data presented will be: provider specialty, provider, procedure status, attending, principal diagnosis,

procedures performed, principal anesthesiologist, indication for procedure, and operative findings.

## URINALYSIS

### URIN

This component contains information extracted from the Lab package. Not only do time and maximum occurrence limits apply to this component, but the user is allowed to select as many as seven atomic Lab tests. Data presented include: collection date/time, specimen, test names with results and reference flags in columnar (horizontal) format.

## VITAL SIGNS

### VS

This component contains vital measurements extracted from the Vital Signs module of the Nursing package. Time and maximum occurrence limits apply. Data presented include: measurement date/time, blood pressure (as SBP/DBP), pulse, temperature, height, weight, and respiratory rate.

## VITAL SIGNS DETAILED DISPLAY

### VSD

This component contains vital measurements extracted from the Vital Signs module, and differs from other Health Summary Vital Signs displays by including the Vital Signs Qualifiers (sitting, standing, left arm, etc.) with the vitals measurement. Time and maximum occurrence limits apply. Data presented includes measurement date and time, temperature, blood pressure, pulse, height, weight, respiratory rate, CVP, PO2, circumference and girth, and pain.

## VITAL SIGNS OUTPATIENT

### VSO

This component contains outpatient vital measurements extracted from the Vital/Measurements (Gen. Med. Rec. - Vitals) package. Time and maximum occurrence limits apply. Data presented includes: measurement date/time, blood pressure, (as SBP/DBP), pulse, temperature, height, weight, and respiratory rate. Metric values will be displayed for temperature, height and weight. If there are no outpatient measurements, a message will be displayed and the last non-outpatient measurements will be shown.

## VITAL SIGNS SELECTED

### SVS

This component contains selected vital measurements extracted from the Vital Signs module of the Nursing package. Time and maximum occurrence limits apply, and the user is allowed to select any of the vital measurement types defined in the Vital Type file (e.g., pulse, blood pressure, temperature, height, weight, and respiration rate). Data presented include: measurement date/time, measurement type and measurement value. Note: Formatted display is horizontal.

## VITAL SIGNS SELECTED OUTPAT.

### SVSO

This component contains selected outpatient vital measurements extracted from the Vital/Measurements (Gen. Med. Rec. - Vitals) package. Time and maximum occurrence limits apply and the user is allowed to select any of

the vital measurement types defined in the GMRV Vital Type file (e.g., pulse, blood pressure, temperature, height, weight, and respiration rate). Data presented includes: measurement date/time, measurement type and measurement value, and metric values for temperature, height and weight. If there is no outpatient measurements, a message will be shown and the last selected non-outpatient measurements will be shown. Note: Formatted display is horizontal.



## Appendix D—VISTA And Health Summary Conventions

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### Special Keys, Commands, and Symbols

To use the Health Summary package you need to know how to log on, navigate among menus, and respond to prompts for entry of information. If you need help, ask a coordinator or IRM staff member to give you training or training materials on these topics.

Refer to the *DHCP User's Guide to Computing* for basic information about general computing and your computer system.

The Health Summary package follows Kernel and VA FileMan user conventions. A few package-specific symbols, keys, and option responses are briefly described here and fully described throughout this manual at appropriate places.

|                    |  |
|--------------------|--|
| <b>&lt;RET&gt;</b> | Enter return (indicated by <RET> in this manual) after every response or when you wish to bypass a prompt, accept a default, or return to a previous action.   |
| <b>Comp=C</b>      | Enter a health summary component abbreviation equal to C (e.g., ADR=C) to temporarily change a component's Occurrence Limit, Time Limit, Hospital Location Display, ICD Text Display, Provider Narrative Display, and Selection Items (if it's a selected component and these items are used).   |
| <b>?</b>           | Enter a question mark after a prompt to see valid instructions for responding to that prompt.  |
| <b>??</b>          | Enter two question marks to see more detailed instructions or a list of choices.   |
| <b>//</b>          | Double slashes indicate a default response has been provided by Health Summary to speed up the entry process. This is either the most likely choice, the safest response (e.g., Do you really want to delete this .....? NO//), or a previously entered response (for example, Select Health Summary Type: INPATIENT//). If you wish to select the default response INPATIENT, press the return key. Otherwise, type the name of a different summary type. |
| <b>^</b>           | A single up-arrow (also called a caret or circumflex) functions several ways in this package depending on where you are and what you're doing. The up-arrow can terminate a series of questions and  |



return you to a previous level. It can also exit you from the health summary and take you to the Select Patient: prompt.

- ^^ A double up-arrow exits you out of the menu option you're in and returns you to the menu.
- + Enter a plus sign (+) after the "Press <RET> to continue, ^ to exit, or select component:" prompt to advance to the beginning of the next component when viewing an online health summary.
- Enter a minus sign (-) at the "Press <RET> to continue, ^ to exit, or select component: prompt returns you to the beginning of the previously displayed component when viewing an online health summary.

### Printing Conventions:

When you are prompted for Device: you have the following choices:

- <RET> Accepts the default causing the summary to be displayed on your CRT screen.
- LASER Enter a valid printer name (LASER is an example).
- ? Lists printers from which you can select one.
- Q or q Allows you to queue the health summary task (meaning it will print at a later time and place). When queuing a task, make sure you enter a *time* in addition to a date; for example: DO YOU WANT YOUR OUTPUT QUEUED? NO// **Y**  
YES  
Requested Start Time: NOW// **T+1@1500** (Today + 1 day, (meaning tomorrow) **at 1500**).

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